

WHITEPAPER

# THE JOURNEY TO WORKFORCE OPTIMISATION

For UK-Based Contact Centres



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## WHAT IS WORKFORCE OPTIMISATION (WFO)?

Workforce optimisation (WFO) is a growing industry concept of the convergence of cross-functional technologies that focuses on quality monitoring, workforce management, performance management and eCoaching<sup>3</sup>. WFO aligns with the business strategy and ensures that the key organisational goals are clearly reflected in each of its metrics.

## IS WFO NOT JUST WORKFORCE MANAGEMENT (WFM) BY ANOTHER NAME?

No, the successful deployment of workforce management forms the foundation of WFO. It delivers the operational efficiency essential within a contact centre, meeting customer demand by ensuring effective team shifts and schedules and optimising each day's performance. **Manual scheduling** by labour-intensive upload of the automatic contact distribution (ACD) and channel data into spreadsheets is time consuming and can be error-prone.

What does WFM do? It automates the generation of reliable schedules for available agent resources to best match the **multichannel traffic forecast** of customer demand.

The two fundamental activities performed within WFM solutions are **demand forecasting and scheduling**. Organisations benefit from accurately forecasting traffic levels across all available interaction channels. WFM focuses attention on effective resource management of the activities of each day across 15 minute intervals. Relevant, fair **agent schedules** are easiest when they are generated from accurate forecasts.



**Intraday optimisation** is the ability for managers to rapidly respond during any day, irrespective of the cause. The removal of one agent can impact queue lengths and call abandonment. **Agent adherence** works to ensure agents match demand with the number of agents required in 15 minute intervals.

For a detailed view of WFM, its business case and how to maximise your WFM investment, please see Netcall's whitepaper "Workforce management in the journey to workforce optimisation".

## WHY THEN ARE ORGANISATIONS CONSIDERING WORKFORCE OPTIMISATION?

Organisations challenge contact centre leaders to meet the internal demands to reduce operating costs whilst accommodating rapidly increasing customer expectations. Using a cycle of continuous improvement enables their centre to deliver realistic solutions and improve customer satisfaction.

There is growing customer demand for multichannel access which Gartner<sup>1</sup> believe creates a 'nexus of forces'. These external challenges, namely *mobile*, *social*, *cloud* and *information*, intersect and combine and are disruptive to business operations. As organisations adapt and manage new ways of working the change process often triggers internal challenges, such as process revision, up-skilling and quality management, which need attention and resolution.

### CHALLENGES FACING CONTACT CENTRES<sup>2</sup>



While initially the external forces were considered an IT concern, they are now acknowledged to require organisation-wide attention. In particular they affect contact centre operations as they strive to deliver customer service as a competitive advantage. The tools within workforce optimisation (WFO) support contact centres and their managers to successfully respond and adapt to consistently deliver on-target quality performance while maximising the productivity of all resources.

WFO is a journey rather than a single action, often met with discrete components each delivered to answer a specific pressing functional requirement. The separate technologies deliver productivity benefits and a payback after installation. The organisation can then evaluate options and continue on an appropriate journey in answer to the next efficiency and quality need. This portfolio accumulates and over time the organisation becomes aware of the evolution within its culture and processes.

## TOOLS TO SUPPORT EFFECTIVE WFO

- Obtain a 360-degree real-time view of performance
- Effective WFO requires a mix of activities and tools
- Utilise call recording, speech-interaction analytics and post-interaction surveys
- Improve agent effectiveness

Successfully implementing any WFO journey combines your understanding of your customers and their behaviour with a clear review of your organisation's processes, culture and future vision. This means your WFO deployment is your unique response to a mix of market pressures, competitive differentiation and strategic priorities tailored to the specific needs of your organisation.

No single off-the-shelf product can deliver the scope of work needed, and understanding the route to WFO can appear very daunting for organisations. We explore the mix of WFO contact centre tools, including performance analysis, strategic planning and training.



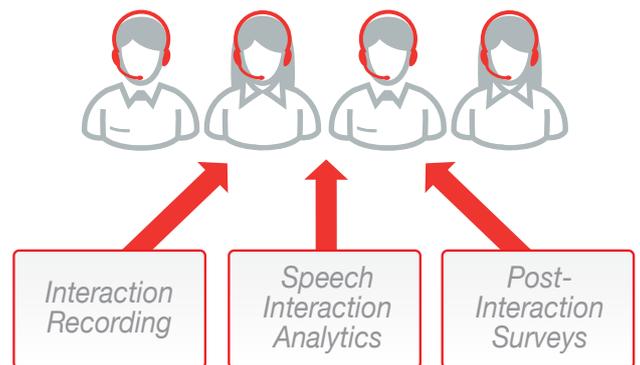
Delivering winning customer service begins with ensuring that there are enough suitably trained agents available to meet forecast demand. Monitoring service delivery and the rate at which agents resolve customer queries tends to result in a drive to improve productivity, and typically prompts the introduction of agent adherence measures.

These initial steps are workforce management resource-focused processes (WFM) used to ensure that the contact centre meets service levels and targets. ContactBabel<sup>5</sup> reports that 38% of UK contact centres manage their WFM with informal in-house or manual systems.

## MEASURING QUALITY AND PERFORMANCE

In order to maximise consistency, effective contact centres introduce a competency-based, agent performance framework and initiate projects that will re-engineer the operating culture. Empowering agents to do what is right enhances customer satisfaction. Usually these frameworks are aligned to a quality assessment (QA) scorecard monitoring a range of key performance measures. Some organisations<sup>6</sup> have reduced critical errors by over 30%, while QA disputes are reduced by nearly half when adopting this approach. Tools to achieve consistent performance include:

### 3 KEY ENABLERS OF CONTACT CENTRE QUALITY & PERFORMANCE



**Interaction recording:** Interaction recording is the ability to capture and replay every type of contact centre interaction, either selectively, on demand, or on an ongoing basis. More than voice recording, interaction recording captures across many channels, and is essential where there are strict compliance regimes. Supervisors need the ability to access an archive, select, replay and analyse any type of interaction, as well as to track and view the desktop screens that agents used during a call. Supervisors are able to create an event timeline with a chronological review of the information. This provides a clear, easy-to-follow sequence of events, and accelerates time to resolution.

This activity also provides valuable data to support 360-degree evaluation of multi-skilled agents.

**Speech interaction analytics:** Tools are now capable of identifying trends and insight, both from structured sources such as call flows and unstructured sources such as audio and text. For example, using speech recognition, audio can be scanned and converted to text. Transcriptions or other text-based material is scanned for terms using phonetics or keywords. Software makes these processes fast and reliable. Meaningful reports help to assess trends, customer concerns and agent quality. Analysis of recorded calls will provide a priority log of reasons for customer contact, enabling high-volume common queries to be researched and resolved. Remain in control and empower agents to resolve these queries or to effectively inform customers with the proactive prepared answers.

**Post-interaction surveys:** Automated direct customer feedback provides real-time honest input, and the anonymity and convenience of automation improves response levels and gathers unbiased feedback. Business rules can determine when customers are invited to contribute input following different types of interaction. Typically these will be initiated via interactive voice response (IVR), web chat, email or SMS. A programme of personal outbound follow-up calls can still be useful but tend to be of greatest value when responding to complaints, concerns or exploring very complex or unusual circumstances.

**Enhancing agent performance with evaluation and training:** When agents feel appreciated and are constantly engaged the agent churn is reduced<sup>4</sup>. Trained motivated agents are more likely to be engaged and deliver excellent customer service. Proactively addressing any agent's lack of skills through training will support the contact centre to deliver on key strategic business objectives.

Enhance existing coaching activities and integrate performance and quality monitoring to drive specific context-driven and relevant agent training. Analyse and then prioritise urgent compliance or behavioural remedies and provide immediate mentoring or training to upskill and reduce critical error rates. Some organisations use context-driven e-learning. For example, systems can identify particular phrases or key words that typically highlight a specific behavioural weakness, which will better facilitate tailored coaching and training programmes.

E-learning routines can then be automatically triggered to present video clips or best practice materials to help the agent address the weakness. Online or downloadable training aides ensure that vital internal knowledge and intelligence is harnessed and stored within the business. Having a formalised set of training aides captures insight and knowledge and reduces the impact of training and/or supervisor staff who may move out of the department. Short face-to-face sessions are also beneficial to ensure that the agent genuinely understands how their behaviour needs to change. Incidents and consequent feedback are automatically logged as part of the regular agent evaluation process.

## ANALYSIS FOR REAL-TIME AND STRATEGIC RESPONSES

Real-time data accuracy is essential in keeping management informed and equipped to make necessary proactive decisions.

**Performance analysis and management:** Develop a suite of reports and dashboards to provide managers and supervisors with real-time data that will provide an objective basis for decisions to maximise quality and performance. An integrated system will monitor multiple elements of the contact centre and will update dashboards, providing a 360-degree view of performance and generating alerts on service level fluctuations. Combined with automated workflows based on business rules, this data will trigger activities and processes.

**Strategic and scenario planning:** Organisation strategy will include and reflect the role planned for the contact centre. It is likely that the strategy will be implemented over time and in phases. Contact centre managers will need to develop operational plans for each stage of the strategic plan.

Scenario planning designs the approaches that could impact interaction traffic levels, and aids understanding the impact each would have on the business unit in terms of agents, support, budget and compliance. Some WFO vendors can help guide the process with useful software modelling tools.

## INTEGRATED SYSTEMS AND TOTAL COST OF OWNERSHIP

The standalone nature of disparate or unconnected systems means reports and data processes are manual. It often requires managers to implement work-around processes to deliver meaningful reporting data. This fragmented approach results in managers investing more time in developing reports and views than in implementing actions from the insight they have gained. Data is, as a consequence, historical and the organisation loses the capacity to proactively respond.

There is significant efficiency and competitive benefit to be gained from connecting current solutions by using web services, for example, to form an integrated end-to-end process and view of the data. Using appropriate roles-based security the organisation can further extend this view to enable log in allowing visibility of all client interactions and recordings through a secure, centralised database.

Gartner<sup>7</sup> suggests that the most effective contact centre infrastructure solutions are those delivered by a single platform. Such single supplier solutions integrate a range of channel applications and can offer a rapid reduction in operational costs with a relatively quick payback period.

The process of implementing WFM will also have a strong impact in shaping the approach to contact centre structure, behaviours, quality and performance. The trust established between an organisation and its WFM supplier will prove invaluable when it is time to move on to adopt full WFO.

“The era of buying stand-alone, best-of-breed, agent-centric technologies for core WFO functions (*such as call recording and agent scheduling*) is gradually coming to an end. The benefits of a WFO suite approach range from having a single-vendor contract and a lower total cost of ownership (TCO) to removing integration problems, while the incorporation of cross-functional workflow is driving adoption.”

Jim Davies Gartner Analyst<sup>7</sup>

## FINDING EFFECTIVE SUPPORT ON YOUR JOURNEY TO WFO

Your ideal WFO solution will comprise a wide mix of tools, some will be internally developed and others from vendors, as you work to realise your strategic goals. Typically you will consider some or more of these technologies.

- Traffic forecasting and scheduling
- Skills-based routing
- Data access toolkits
- Call and screen recording
- Agent adherence
- Speech analytics
- Quality monitoring
- Customer surveys
- Mass notifications
- Automated queue intervention
- Automated call back for channel shift

Any solution you choose needs to effectively integrate within your current infrastructure to ensure that you maximise the benefit of your workforce optimisation deployment. When you meet with vendors you might want to consider how their attributes match your needs in terms of:

- Their ability to support you to implement strategically important business initiatives, enabling the rapid cost effective delivery of new capabilities without being constrained by legacy equipment
- Their approach in ensuring that the solution is 'fit for your purpose' and meets your business requirements now and in the future as regards scale, new channels, cost over time, dedicated support and reliability
- The freedom and flexibility to realise the optimum technology and cost-saving benefits of on-premise, cloud and virtualised deployments as your business needs change.

Netcall's Liberty® suite provides large and medium sized UK organisations with comprehensive workforce optimisation solutions. We focus on delivering value and helping customers to balance their business objectives with the most effective solutions and their deployment, achieving a rapid return on investment while increasing customer satisfaction. Deployment can be on-premise, via the cloud, or as a hybrid or virtualised infrastructure.

### References:

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Netcall is one of the UK's leading providers of end-to-end Customer Engagement Solutions.

Our software product suite provides compelling solutions that are transforming customer engagement, including Multichannel Contact Centre, Workforce Optimisation, Proactive Outbound Applications, Customer Self Service, IVR & Speech Recognition, PCI IVR Payments, Case & Document Management and Customer Service Business Process Management. Our solutions are available on-premise, cloud or a hybrid blend of both.

Netcall's customer base contains over 700 organisations in both the private and public sectors, including over 70% of the NHS Acute Health Trusts, major telecoms operators and leading commercial organisations across many sectors. Our aim is to enable clients deliver superior customer service.

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