

2016 Workforce Management Seminars

5 Module Workforce Management Core Programme
Data Collection and Analysis: Getting Off to the Right Start Review data sources for the WFM process and needed adjustments for aberrations
Forecasting Fundamentals: Proven Practices for Predicting Call Workload Learn strategies for gathering data and applying time-series analysis to predict calls
Calculating Call Center Staff: The Math of Call Center Staffing Tradeoffs Apply Erlang and other staffing calculations and evaluate service and cost tradeoffs
Scheduling Principles and Problems: Solutions to Scheduling Challenges Discuss scheduling issues and identify schedule optimization strategies
Managing Daily Service Levels: An Intra-Day Guide to Managing Staff and Service Monitor intra-day developments and make adjustments to optimize staff and service
Workforce Management Electives
Introduction to Workforce Management: An Overview of the WFM Process Define WFM, its importance in the call center, and the detailed steps of the WFM process
Attendance and Adherence: Getting and Keeping Bodies in Seats Identify strategies for improving attendance and managing intra-day schedule adherence
Advanced Forecasting Techniques: Fine-Tuning Workload Predictions Hear proven practices for improving the accuracy of your workload forecasts
Skill-Based Routing Design: Balancing Customer, Agent, and Center Needs Optimize routing plans to send each call to person best able to handle it
Skill-Based Routing WFM Challenges: Forecasting and Scheduling for SBR Scenarios Match workforce properly to your center's skill-based routing design
Communications for WFM Professionals: Closing the Information Gap Learn to communicate WFM processes to agents, supervisors, and management

2016 Workforce Management Seminars - Core Programmes

Data Collection and Analysis: Getting Off to the Right Start

The most critical step in the workforce management process is the first one: data collection and analysis. The best predictor of future call workload is past data, so gathering the right data is critical to the workforce management process. Attendees will learn where to look for data and how to scrutinize the data to make sure it's appropriate to feed into the forecasting process. The class will review mathematical techniques for analyzing data and making needed adjustments. The role of business drivers and how to incorporate them into the planning process will also be discussed.

Attendees will learn to:

- Identify the sources of call center planning data.
- Describe the impact of call routing and button usage on input data.
- Identify data aberrations and how to adjust for them.
- Outline business drivers most pertinent to the planning process.

2016 Workforce Management Seminars - Core Programmes

Forecasting Fundamentals: Proven Practices for Predicting Call Workload

While forecasting approaches range from simple gut feel to complex mathematical modeling, there are several that every call center manager should know about. This session reviews the most popular techniques used for forecasting and the advantages and risks of each. Attendees will learn about the step-by-step approach used by most call centers called time-series analysis, including a case study and an exercise to complete after the class.

Seminar attendees will learn to:

- Outline the different approaches used by call centers today and which is most widely used.
- Outline the step-by-step process of time-series analysis.
- Calculate trend rates, seasonal patterns, and day-of-week/time-of-day factors.
- Identify some popular forecasting shortcuts and when to use them.

Calculating Call Center Staff: Understanding Staffing, Cost, and Service Trade-offs

Getting the “just right” number of people in place at the right times to handle the contacts – it’s every call center manager’s dream. However, figuring out the right staffing mix to maximize service to customers, while minimizing cost, can sometimes be a nightmare. This session outlines the step-by-step approach to call center staffing. Attendees will learn about setting service goals and how to use Erlang techniques to determine the right number of bodies in chairs. The session will also discuss the most critical staffing tradeoffs, such as cost versus service concerns, the effect on service of plus/minus one person, the impact of large groups and economies of scale, and effects of staff occupancy. All attendees will receive free *QuikStaff* planning software.

Seminar attendees will learn to:

- Identify factors in setting service level goals and what factors contribute to speed of answer expectations.
- Use Erlang calculations to pinpoint staffing needs.
- Identify service and cost tradeoffs and ways to improve service without adding staff.
- Describe the most common mistake call centers make in determining staff numbers.
- Identify ways to incorporate multi-media contacts into the staff planning process.

Scheduling Principles and Problems: Practical Solutions to Call Center Scheduling Challenges

Have you managed to arrive at the delicate balance between efficient schedules and staff preferences? Don’t worry - you’re not alone! It’s the age-old problem that workforce planners and call center managers continue to struggle with week in and week out. And just when you’ve got it figured out, throw in skill-based scheduling, extended hours of operation, or the need to cover emails and web chats in addition to calls. This session outlines the most common scheduling problems call centers face and will provide some traditional solutions as well as some creative new ones to help with your scheduling dilemma.

Seminar attendees will learn to:

- Describe schedule efficiency versus acceptability conflicts.
- Identify the ten most common scheduling problems call centers face today.
- Describe options that have worked for other call centers in solving scheduling problems.
- Examine schedule horizon tradeoffs.
- Identify long-term scheduling strategies as well as real-time reaction strategies to meet service goals.
- Describe the latest workforce management software capabilities for solving scheduling problems.

2016 Workforce Management Seminars - Core Programmes

Managing Daily Service Levels: An Intra-Day Guide to Managing Service and Performance

Everything is in place. You've forecasted workload according to best practices and created a staffing plan and set of schedules to efficiently match the workforce to the workload. But you know what they say about the best-laid plans. It's critical to track how well the plan is working every single half-hour of every single day to ensure service goals are being met and employees are being utilized effectively. This session will outline the process of tracking performance within the day and provide overstaffing and understaffing reaction strategies should the plan go awry.

Seminar attendees will learn to:

- Identify the components and the process used to track daily performance.
- Outline the steps of developing a communications plan should changes in staffing be required.
- Identify reaction strategies from both a staffing and technology perspective.
- Outline the many types of intra-day activities that affect staff availability and how to track them.
- Identify the most critical measures of intra-day performance and when to use each one.

2016 Workforce Management – Electives

Introduction to Workforce Management: An Overview of the Workforce Management Process

Workforce management is the process of getting the “just right” number of staff in place every hour to maximize service and minimize cost and it's one of the most important planning and management functions in the call center. In this session, you'll learn the implications of getting the numbers wrong, as well as the step-by-step process of effectively forecasting calls, calculating staff requirements, creating staff schedules, and tracking daily service and performance. You'll hear about the critical tradeoffs between staffing, service, and cost and how each of these tradeoffs affects the final staff count. Attendees will also learn the impact that each and every person can make in terms of achieving service goals for the day.

Seminar attendees will learn to:

- Define workforce management and its implications on cost and service.
- Describe why call center staffing is such a unique kind of problem.
- Outline the step-by-step process of forecasting calls, calculating staff, and creating workforce schedules.
- Identify the impact that every single individual has on meeting service goals and balancing workload.

Attendance and Adherence: Getting and Keeping Bodies in Seats

One of the toughest jobs related to workforce management may not be the intricate calculations of forecasting nor the numerous iterations of coming up with the best schedule mix. The hardest part may come after the schedules are in place – simply ensuring there are frontline staff available when and where you need them to be. Some call centers are much more successful than others at this attendance and adherence dilemma. So how do you get staff to show up for work on Mondays and stick to their planned break times? This session will share proven practices on attendance and adherence that have resulted in increased availability.

Seminar attendees will learn to:

- Quantify the cost and service implications of missing staff.
- Identify ways to communicate and educate staff on the “power of one” in call center staffing.
- Describe options for setting adherence performance goals and selling to the staff.
- Identify reward and consequence programs that support adherence goals.

2016 Workforce Management – Electives

Advanced Forecasting Techniques: Fine-Tuning Workload Predictions

Without an accurate forecast of workload and staff requirements, the scheduling process will be inefficient. This session will explore various approaches to help fine-tune your tactical call forecasting process. Whether you're forecasting by spreadsheets or with workforce management software, you'll learn how to improve the accuracy of your daily and half-hourly forecasts through techniques like regression analysis and use of correlation coefficients.

Seminar attendees will learn to:

- Calculate forecast accuracy by various methods.
- Outline additional components of time-series analysis beyond trend and seasonality.
- Identify predictable cycles in call center workload.
- Apply correlation coefficient techniques to fine-tune forecasts.

Skill-Based Routing Design: Balancing Customer, Agent, and Call Center Needs

This session provides a map to guide you through a process of applying skill-based routing (SBR) fundamentals to both a traditional and multi-channel environment. It will help you determine and assign priorities in order to manage service differences that make the most sense in your center. If you are responsible for providing service to customers via multiple channels, you will find valuable guidance in this session to help you succeed in properly designing your skill-based routing system.

Seminar attendees will learn to:

- Outline the benefits and challenges of designing an effective SBR plan.
- Describe the most critical first step in the SBR process and alternatives for achieving it.
- Describe design concepts for progressive agent training and varied agent skill situations.
- Analyze sample case problems for design implications.

Skill-Based Routing WFM Challenges: Forecasting, Scheduling, and Intra-Day Management with SBR

This session provides a brief review of the skill-based routing (SBR) design principles and focuses primarily on the changes that will be needed in the workforce management (WFM) operation. The first step in any effective WFM process is to obtain accurate historical data so the ACD and router setup to support this is critical. Agent and caller priorities can be useful but can create significant challenges in the planning and intraday management of the operation. Matching the WFM processes to the SBR design will go a long way toward achieving the efficiencies and effectiveness that SBR promises.

Seminar attendees will learn to:

- Describe the basic design principles involved in SBR configurations.
- Describe the challenges of achieving forecasting accuracy and tips for better data collection.
- Identify the process of scheduling agents to match SBR configuration demands.
- Describe the challenges of intra-day management of SBR and how to overcome them.

2016 Workforce Management – Electives

Communications for WFM Professionals: Closing the Information Gap

Workforce planners sometimes speak their own specialized language in terms of erlangs, occupancy, and adherence. Unfortunately, it's a language not always understood by others in the center, including the senior management team as well as supervisors and frontline agents. It's important to the success of the schedule plan to get cooperation and schedule adherence from supervisors and agents and you'll want to speak management's language to get approval for the resources needed. This session is all about ways to improve your communications build stronger relationships and educate others about the WFM process and its value to the organization. Learn about four types of communication styles, how to identify your style and ways to adjust your communication to those who tend toward a different style. Hear about conflict management strategies to help you more effectively interact with all levels of call center professionals.

Students will learn to:

- Communicate the value and importance of WFM throughout the organization.
- Outline the steps of the WFM process in easy-to-understand language.
- Educate others about their role in the WFM process.
- Identify communications styles and techniques to maximize interactions.
- Describe conflict management strategies to improve WFM relationships with other groups.

Other Workforce Management Training Options

Private On-Site Seminars

The Call Center School faculty can bring our popular Workforce Management 1-2-3 class to your site. The cost for the two-day delivery is \$8,000 (plus GST, instructor travel expenses if any) for up to 20 students.

Registration

You can register [here](#), email us: enquiries@greatoutcomes.co.nz or call us to register on 09 523 1400.

