Buyer's guide to WFM

How to choose the right workforce management solution for your contact centre

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When every moment matters

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Introduction

WFM is your key to happier staff and customers!

With a cloud WFM solution, you can stop agonising over complex and breakable spreadsheets and start making a real difference for your company.

In this white paper, we explain everything you need to know about workforce management and what to look for when shopping for a solution. From the five crucial steps of WFM, to the must-have features and questions to consider – it's your guide to better resource planning and performance.
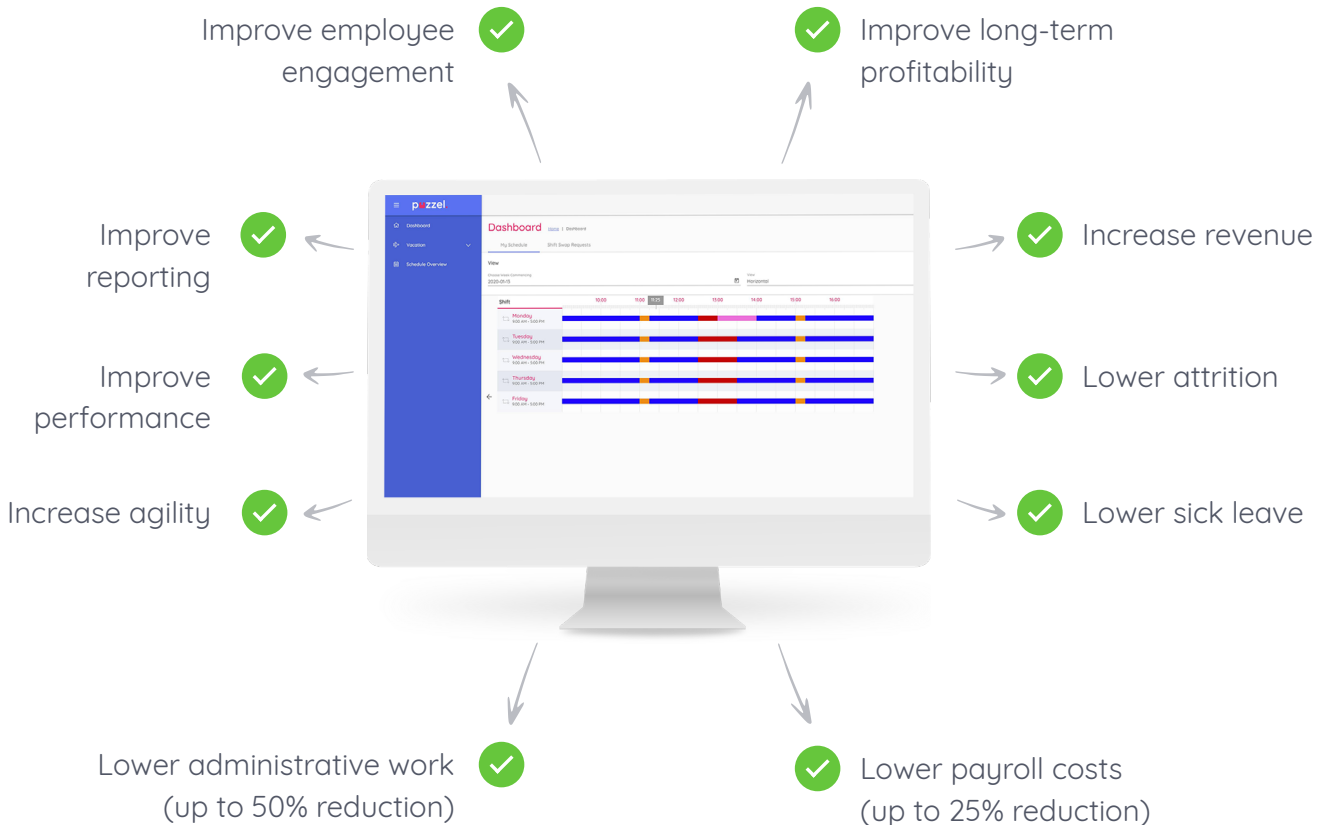
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What is WFM?

Workforce Management (WFM) solutions help companies manage their staff more efficiently and effectively. This is achieved through forecasting, scheduling, intraday management, real-time adherence and reporting.

Managers of large teams – typically in service roles with diverse skill sets and/or working hours – use WFM software to help them accurately forecast future demand and staffing requirements. These forecasts are then used to generate staff schedules, optimised to achieve the maximum level of productivity for the lowest possible cost.

During the scheduled time period, managers can adjust shifts in real-time and monitor adherence to ensure demand is continually met and staff are working productively. They can then close the loop with analysis and reporting, reviewing the accuracy of their forecasts and effectiveness of their schedules to continually improve performance.

The latest WFM solutions also include agent self-scheduling, which enables agents to submit their availability, request shift changes, trade shifts with colleagues and manage their holidays via a dedicated agent portal. This significantly reduces the amount of administrative work for managers and increases agent engagement, leading to lower sick days and attrition.

WFM can help your organisation:

Improve employee engagement

Improve long-term profitability

Improve reporting

Increase revenue

Improve performance

Lower attrition

Increase agility

Lower sick leave

Lower administrative work (up to 50% reduction)

Lower payroll costs (up to 25% reduction)

Why do contact centres use WFM?

Contact centres typically employ a large number of customer service agents with diverse skills, who need to be strategically scheduled to meet customer demand across a range of channels.

For resource planners, this can be a complicated and time-consuming process, especially when working solely with spreadsheets. Then when you throw in lunch breaks, holidays, last-minute sick days, training days, unpredictable spikes in demand, overtime costs, and strict service-level agreements – it can become truly overwhelming and highly prone to error.

A WFM solution can help **simplify** and **take the guesswork out** of scheduling.

By using historical data captured directly from the contact centre, resource planners can generate accurate forecasts and create optimised schedules that will ensure the highest service levels for customers, the best experience for agents, and the lowest operational cost for the organisation.

The scheduling process is reduced to just minutes, rather than days, and can be completed in a single application accessible on any device, at home or in the office. With agent self-scheduling, companies can also reduce managerial overhead while offering agents greater flexibility and autonomy.

This all leads to improved customer satisfaction, employee engagement and revenue.

WFM Checklist

Does your contact centre:

- [ ] Manage multiple customer service channels

- [ ] Employ agents with a mix of skills, expertise and/or specialisations

- [ ] Operate outside of regular business hours (e.g. extended business hours or 24/7)

- [ ] Employ a large number of customer service agents

- [ ] Experience unpredictable periods of high and low demand

- [ ] Have set service-level agreements (SLAs)

If your contact centre ticks one or more of the above, you need WFM!

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Understanding the WFM process
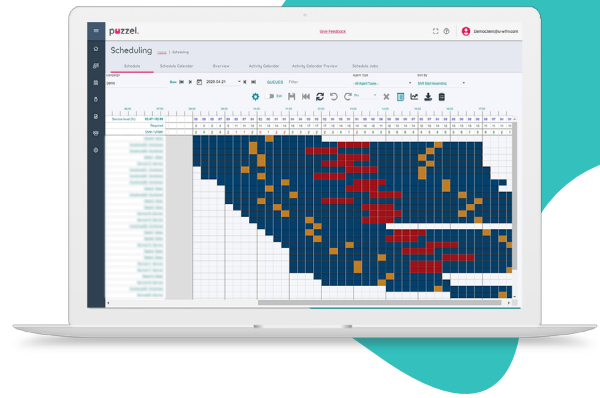
Workforce management involves five crucial steps: forecasting, scheduling, intraday management, adherence and reporting. In the contact centre world, this is usually carried out by a resource planner.

Step 1: Forecasting

To create a schedule, a contact centre resource planner must first forecast customer demand. This will indicate how many staff they'll need to meet expected service levels.

To create an accurate forecast, the planner imports historical demand data captured directly from the contact centre into their WFM solution.

This data is analysed and then used to generate a detailed graphical forecast.

The forecast shows the expected contact volumes and average handling time (AHT) for each 15-minute interval over the date or time period chosen by the resource planner.

If needed, the planner can then smooth the forecast by dragging and dropping any of the data points.

Step 2: Scheduling

Once a forecast has been created, the resource planner can then create a schedule.

Still using their WFM solution, they can simply select the forecast they wish to use and the system will generate a schedule automatically optimised to meet the predicted demand and all legal and contractual requirements.

Agents' availability, shift preferences and skills are also taken into account. This information can be inputted by the planner, or if they have enabled agent self-scheduling, submitted by agents via a dedicated agent portal.

By involving agents in the scheduling process, contact centres can improve agent engagement and retention. They can also reduce sick days, with agents able to trade shifts if they feel unwell.

Step 3: Intraday management

During the scheduled time, the resource planner can adjust or rearrange shifts at any time – and in real-time.

For example, they can reassign shifts if an agent calls in sick or move shifts around to make time for a team meeting or company activity.

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Step 4: Adherence

During the scheduled time, the planner can also see what each agent is doing versus what they should be doing.

If there are any deviations from the schedule, they can take action in real-time to ensure customer service levels continue to be met.

Deviations from set plans are always bound to come up. The faster an organisation can detect these, the faster they can react.

Most of the time, the reasons for deviations tend to be out of the planner's control (eg. marketing is running a new campaign or finance has changed the appearance of invoices). That's why it's important for planners to communicate with all divisions and stay-up-to-date on any events that may affect contact volumes and handling time.

Quantifying the cost of non-adherence

100 agents

x €14.00 an hour

x 30 minutes outside adherence each day

= **€700 cost per day or €256k a year**
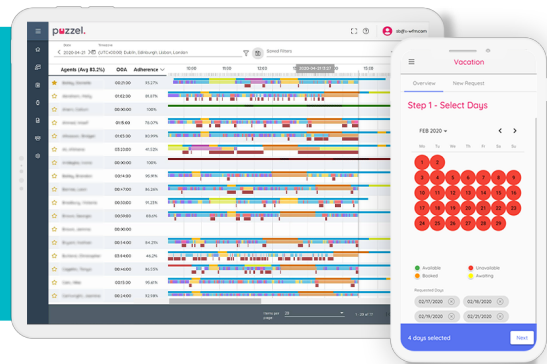
Step 5: Reporting

At the end of the schedule, the resource planner can compare their targets with the actual data to determine if their forecasts were accurate or if amendments should be made in the future.

They can also generate a range of reports, including shift, adherence, holiday or payroll reports.

Shift reports provide a summary of shift times and activities performed by each agent, while adherence reports record how long each agent worked, the various activities they performed and if they were ever late to a shift. Holiday reports show the number of authorised and remaining holidays for the current and next year for each agent. And finally, payroll reports can be created to keep track of agents working extended hours so they can be appropriately compensated.

Through these steps, contact centre resource planners can ensure their organisation's customer service operation is always efficiently and effectively staffed.

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Features to look for in a WFM solution

WFM solutions can vary greatly, so it's important to weigh all the information and implications for your contact centre before making a decision.

We recommend starting with a clear set of business needs. What is it that you want to achieve? Why is your current WFM process or solution failing to deliver? And what are your pain points?

This should help you determine which technical features would be 'nice to have' versus which you cannot live without. Buyers can then compare other factors, such as implementation, training, after care and cost, to identify which solution will deliver the most value and return on investment.

Functionality

If your contact centre currently serves more than one customer service channel (or plans to introduce more channels in the future) first and foremost, you'll need multi-channel forecasting. This will enable you to forecast the demand and staffing requirements for voice and all other digital channels, such as web chat and social.

If you employ a mix of office-based and remote agents, you may also want a solution that includes agent self-scheduling. This will enable your agents to manage their availability, holidays and schedules from home or in the office.

Below are the features we believe are 'must-haves' for effective workforce management.

Forecasting

Multi-channel forecasting	Generate forecasts based on historical data direct from your omnichannel contact centre.
Automatic and manual smoothing	Automatically or manually remove outliers and 'special events' from your forecasts to improve accuracy.

Scheduling

Optimised scheduling	Create schedules based on forecasted demand, defined work rules, agent skills, agent preferences, and service level goals.
Intraday Management	Adjust and rearrange agent shifts in real-time to respond to real-life events in your contact centre.

Adherence & Reporting

Real-time Adherence	See what agents are doing versus what they should be doing and track team performance in real-time.
Reporting	Produce adherence, shift, holiday and payroll reports.

Agent self-scheduling

Employee interface	Enable agents to submit availability and self-service via a secure web portal to reduce managerial overhead.
Mobile app	Enable agents to submit availability and self-service via a secure mobile app, accessible on Android and iPhone.
Shift preferences	Allow agents to specify preferred working times.
Shift swapping	Allow agents to request and trade shifts.
Holiday management	Allow agents to request and manage their own holidays.

Integrations

Contact centre solution	Consolidate your WFM and contact centre solutions to streamline customer service operations.
HR / Payroll systems integration	Connect your WFM and HR/Payroll solutions to streamline payroll processes.
Open APIs	Connect your solution with any additional business-critical software and systems.
Out-of-the-box integrations	Customise your solution with your favourite third-party apps to meet your business needs now and in the future.

Security & Support

True cloud	Securely hosted within an enterprise-grade cloud infrastructure.
GDPR	Fully compliant with GDPR privacy and data protection regulations.

Essential questions to consider: Does the solution have the tools you need right now to meet your business goals? Will the solution be able to grow with you as your needs change? (This is vital for the longevity of your solution)

Implementation

WFM solutions can take between 4 to 16 weeks to deploy, depending on the provider. This is because unique scheduling rules need to be set up for each company and interaction data needs to be imported.

Usability can also impact deployment time. If the system is unintuitive and difficult to use, it will take longer to set-up.

Puzzel WFM is one of the fastest solutions to deploy on the market, with an average set-up time of 4 to 5 weeks. This enables users to achieve a return on investment (ROI) within as little as 3 to 4 months.

Essential questions to consider: How long will the solution take to set-up and deploy? What impact will this have on your contact centre?

Training

There has been significant investment made in recent years to simplify and improve the usability of WFM solutions.

Contact centres no longer want complicated systems that can only be understood and used by expert resource planners. Instead, they want software that is easy enough and intuitive enough to be used by anyone. This is especially important for smaller contact centres, who often rely on only one or two users and can therefore be vulnerable to sickness and unplanned absences.

Investing in a user-friendly solution will also help keep training costs low. While some WFM solutions can take up to 200 hours to learn, Puzzel WFM can be mastered in just 8. We supply step-by-step guides on forecasting, scheduling and reporting, and offer a comprehensive online course that can be accessed on any device, at any time, via our Puzzel Academy.

Essential questions to consider: Is the solution easy to use? How long will it take to train users? Can training be done in-house or will you need to purchase specialist training from your provider?

After care

As a customer service professional, we don't need to tell you about the importance of after care.

Having friendly experts on hand to answer your queries and offer support can make all the difference on your WFM journey. Puzzel offers continued user support throughout the use of your WFM solution and provides user-friendly online videos to assist you in the scheduling and forecasting process.

With a cloud solution, system upgrades, security-patching and version control are also seamlessly optimised.

Essential questions to consider: Who will maintain your solution? Will you have access to expert support?

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Budgeting & ROI

In the past, only large contact centres with hundreds of agents tended to invest in WFM due to the high installation, training and maintenance costs associated with legacy solutions. However, the rise of easy-to-use, cloud-based solutions has now enabled even the smallest of contact centres to benefit from WFM.

When shopping for a solution, buyers should consider both cost and return on investment (ROI). Here are some of the areas where Puzzel WFM users typically see savings:

Staffing: With a WFM solution, contact centres can more accurately predict the resource needed for each 15-minute interval, bringing staffing levels closer to what is truly required. Contact centres can expect a minimum saving of 5%.

Sickness: When staffing levels don't accurately match demand (e.g. are too low during busy periods or too high during quite periods) this can lead to stress, boredom, low morale and potential sickness for agents. By improving forecasting and scheduling, contact centres can improve their agent experience and reduce sickness by around 1%.

Attrition rate: When agents are able to perform the tasks they are trained for, achieve their targets and objectives, see their schedules, and have some control over their working hours (e.g. swapping shifts and booking holidays) they are more likely to stay with your contact centre beyond a year. As a result, WFM users typically see attrition rates fall by a minimum of 10%, saving them thousands in recruitment and training costs.

Overtime costs: With a WFM solution, contact centres can maximise the flexibility of staffing hours to reduce overtime costs significantly. With a low to medium change, a minimum saving of 10% can be achieved.

Adherence: Adherence has a huge impact on contact centre performance. For example, if a 10-minute unscheduled break is taken or an agent is pulled away from their schedule, the impact over the year can be costly. Ten minutes per day lost over the year could translate to losing around 35 hours of lost time per agent per year.
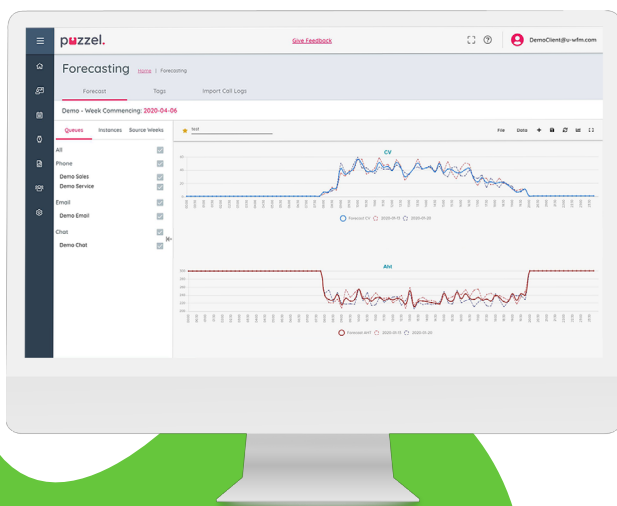
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Case Study:
Simply Business

Simply Business transformed its agent experience and increased adherence from 50 to 80% in just a few weeks with Puzzel's cloud WFM solution.

2 years with Puzzel | **200-250** contact centre agents | **600,000+** customers

The requirement

Simply Business is one of the UK's biggest business insurance providers, specialising in public liability insurance for SMEs. They serve more than 600,000 small businesses and landlords across Britain with just over 200 agents based in Northampton.

Prior to using Puzzel, Simply Business had no insight into their consultants' workloads and wanted to be able to better target and manage their time. They estimated their adherence was around 50% and immediately knew they would benefit from a WFM solution.

The solution

After running a thorough market assessment, Simply Business selected Puzzel WFM because it provided them with a multi-skill, multi-media scheduling system that was easy to use and fast to set up. Being first-time WFM users, they appreciated Puzzel's intuitive design and found the drag-and-drop forecasting tools particularly useful.

They began to see results within just two weeks, noticing efficiencies where they were under or overstaffed at certain times of the day. With this data, they were able to proactively amend shifts and conduct rota reviews which resulted in happier customers and more engaged agents.

The results

Simply Business has now gained greater insight into their agents' workload and performance. They can see what every consultant is doing in real-time and have identified where shifts can be can altered to improve service levels and cut costs. In just a few weeks, adherence improved from 50 to 80%.

Simply Business has also been able to improve its agent experience by designing more effective schedules and identifying the best times of day to engage with staff and hold team-building exercises.

Here's what Simply Business had to say

"We saw the value of WFM immediately because of how agile and simple the product is. It made deployment much quicker than anticipated."

Joshua Kirkbride, Resource Planner

About Puzzel

Puzzel is the leading European Contact Centre as a Service (CCaaS) provider. Our award-winning Customer Service Platform consists of three fully integrated, cloud-based solutions, including an omnichannel and AI-enabled Contact Centre, advanced email and Ticketing and Workforce Management, which are easy to use, quick to set-up and scalable for contact centres of all sizes. Customers can also customise the platform with dozens of third-party integrations available through our Puzzel Marketplace.

Puzzel was recognised as a Challenger in the 2019 Gartner Magic Quadrant report for Contact Centre as a Service in Western Europe and ranked in the top three European CCaaS providers for 2020 by Frost & Sullivan. Based in Norway, and with offices across Scandinavia, Europe, the UK and Asia, we work with more than 1,000 customers across 40 different countries, helping businesses to achieve success beyond voice, connected experiences and empowered employees.

For more information, please visit **www.puzzel.com**