

Practical guide to
**MODERN WORKFORCE
PLANNING**



There's been a marked shift in how people work and the COVID-19 pandemic only accelerated those changes. Employees want more flexibility with their schedules and a more fulfilling work life; many are finding that as new job opportunities emerge. Businesses need to listen.

Preventing burnout or general dissatisfaction is much less expensive than attrition — and it's less disruptive to your customers. With the right tools, workforce planners can offer employees the flexibility they want and keep customer engagement goals on track.

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Why businesses are modernising workforce planning now

Every business wants the right staff in place at the right time to handle customer interactions that meet performance objectives. It sounds simple but the reality is it's more complex. In every contact centre, a wide range of universal and unique factors influence staffing requirements and available staff to offer a full cycle of customer support. Taking advantage of what employees have to offer requires a more systematic approach.

Employees need the skills and training to handle more complex customer interactions across multiple channels. Their personal lives have changed, too. They want to work from anywhere at any time or even have side jobs. And a recent **Ovum report** found that 85% of agents are frustrated they can't meet customer expectations. They want to make a meaningful difference by helping customers but they have little opportunity to deliver empathetic engagements.

TOP BENEFITS OF WORKFORCE PLANNING

- Enhanced customer experience due to improved employee engagement
- Reduced employee burnout and greater retention
- Improved employee decision-making and smoother operations
- Faster response times and more efficient processes
- More data available for continual improvements

Align long-term goals with empathetic experiences

Partner with your employees to put a human face on your business decisions. Agents can share insights into how customers think, feel and act throughout their journeys, giving you a better sense of how to engage your team.

Use these four pillars to guide you in applying empathy to workforce planning and management:

- **LISTEN** – Hear customers and employees for full context
- **UNDERSTAND AND PREDICT** – Focus on outcome-based goals
- **ACT** – Engage with the next-best action, channel and agent
- **LEARN** – Improve the next interaction to drive business results



Whether you want to understand and predict staffing requirements across all digital channels or want simplicity and flexibility in how you manage your employees, this guide can help.

Phase 1

WALK: MASTER THE BASICS

WALK

Master the basics

Planners are under increasing pressure to staff call centres, better manage employees' schedules and forecast further out – and they need to do this more accurately. This requires good data and a shift away from manual processes; it begins in the “Walk” phase of workforce planning. Once you understand what's already working and determine what you need to improve your workforce planning, you'll gain more control over the chaos.

USE CASE

Andy has worked as a planner for years. But it's always been a struggle to keep his scheduling spreadsheet up to date within the constraints of labour laws and regulations – as well as employee preferences. While he works within his budget, he'd like to do more to ensure his call centre staff delivers on business outcomes in the most efficient way possible. To modernise processes and keep employees happy, Andy needs to understand the data.



Assess your organisational and data requirements

No matter your level of maturity with workforce planning, success requires a long-term vision that's driven by data. Once you're committed to a data-driven approach, define the data sources needed to support your business outcomes, capture that information and determine whether you have the talent to fill those needs.

Document all your customer and employee engagement channels and which interactions occur on each one. Then assess each channel for:

- Average engagement time
- Specific skills required
- Hours of coverage (e.g. 24/7 or standard working hours)
- Interaction volume
- Employee skills and availability

TIPS



Examine your demographics if you have many employees nearing retirement age or if younger employees tend to have higher turnover rates.



Representation of protected classes will be important for government contractors who must comply with applicable affirmative action plan requirements.



Workforce policies and constraints, such as your industry, business type, locations and regulations, will vary. You'll also need to consider universal regulations such as labour laws, the Health Insurance Portability and Accountability Act of 1996 (HIPAA), GDPR, the Payment Card Industry Data Security Standard (PCI DSS) and the National Do Not Call Registry.

Map out your resource plan

Resource planning is an ongoing process. It might include hiring plans, who to hire and the best personalities to get the work done. For example, different skills are required for handling emergency calls than selling makeup over the phone. For every employee, the attitudes and competencies they need should match your customer segmentation and engagement plan.

Analyse your data in view of what you currently have and what you need to add. A gap analysis can reveal trends and seasonality. Also note the differences between interaction types, such as interactions from product launch campaigns, which typically have more resources allocated in terms of talent, offers or web pages. Consider how these differ from other interactions and how to apply those lessons.

TIPS TO IMPROVE ACCURACY

- Normalise your call volume to establish full-time equivalent requirements.
- Isolate trends and patterns for events or public holidays.
- Anticipate attrition rates, holidays and shrinkage.
- Forecast volume and average handle time (AHT) instead of staffing.
- Build staffing requirements based on your data analysis.
- Review your workload demand on a monthly basis.

Create schedules that support the business and employees

Shifts used to be referred to as segments for lunch, breaks or work in general. Modern workforce planning uses the term “workplan.” The idea is that, instead of a fixed schedule, you offer employees a template, preferably using an app. It gives them more flexibility and control to change their schedules, which are still based on your business rules. This flexibility improves employee engagement and empowers them as valued team members rather than a cost.

One of the most powerful differences in modern workforce planning is looking closely at why employees are leaving rather than simply pushing them to produce. Even a moderate amount of attrition has a significant impact on profitability; it raises the costs of recruiting, hiring and training. Most importantly, it can negatively affect the quality of the care and service your centre provides.

TIP

Once you’ve identified gaps in coverage, plan ways to address them with workplans that focus more on punctuality than fixed adherence.

Measure your results

Once jobs or interactions are complete, capture what you've learnt by answering these questions and analysing the results by engagement category:

- Did you get what you wanted out of it?
- Was the agent's lead approved as part of your process?
- Was the customer handled well with FCR?
- Did the team leader support and drive the employee's performance?

TRACK THESE KPIS AND WHAT YOU'VE LEARNT FROM THEM:


- **Attrition** — Learn to negotiate with employees and business leaders so that business goals are balanced with empathy for employee needs.
- **Employee satisfaction** — Gain insights with feedback from collaboration and internal, company-wide communication such as surveys.
- **Education and training** — Identify when and how to deliver it and how to measure its effectiveness.
- **Service-level goals** — Set your benchmarks and goals for call volume, AHT, schedule punctuality and call resolution.



Checklist

Before you run:

- Define roles and responsibilities, as well as the required number of resources in each role.
- Establish appropriate, meaningful metrics and get buy-in.
- Document the shifts offered to agents, including start times, breaks and lunch times.
- Identify ways to create practical flexibility (for example, start times between 9–9.30 am rather than a fixed start time of 9 am).
- Document processes on how you'll manage forecasting, scheduling, real-time monitoring, time off and training.
- Communicate the implications of any changes required for planning, why they're necessary and their benefits.
- Build a service-level recovery plan to use when it's apparent that your contact centre is over- or understaffed.

At the end of the **WALK**  **PHASE**, you'll see signs of improvement with initial planning and begin gathering feedback from employees.

Phase 2

**RUN: VALIDATE.
ADJUST. REPEAT.**

Validate. Adjust. Repeat.

Forecasting is a dynamic process that requires continual review and refinement to be effective. In the Run phase, you'll build on your workplans to increase accuracy, efficiency and overall business success – and adjust your forecasting for better results.

USE CASE

New feedback shows Andy that employees appreciate being able to adjust their own schedules. He has also started analysing historical data and comparing it with his forecasts. This review identified several gaps and inaccuracies, such as the time required for training. And Andy uses this data to better plan for an upcoming marketing campaign. He's also talking more with internal peers whose plans and processes affect agents. With a better understanding of the data he needs to input, Andy can automate the forecasting process.



Review all relevant data and feedback

Gather KPI data from the Walk phase on customer interactions and get started. This data should come from many different sources: customer and employee feedback, survey results, topics, sentiment analysis and call outcomes. You should also review historical workforce data and look for patterns.

You'll see where the forecast was inaccurate — and why. Call volume is a good indicator, as well as AHT and call resolution rate. Did these come close to your forecast? Go back to your initial plans and adjust, as needed.

Review your scheduling plans and how well they mapped to actual agent hours. Get agent feedback on how they feel about their schedules and workload to get a sense of the value of this planning from the employee perspective.

TIPS



Assess external factors that might influence what you have and what you need.



Labour market trends/predictions — Depending on unemployment rates, unfilled jobs can influence your ability to backfill quickly and economically.



Business trends — Customer interactions are moving to digital channels, which impacts other behaviours.



Industry trends — Correlate these with how they might impact demand on your engagements.

Compare your KPIs to benchmarks and investigate

In this phase of your planning process, you're looking for outliers — where expectations don't match actuals. If your AHT is high, your agents might not have the right skills or your settings could be incorrect.

If your schedule plans differ from the actual time worked, it could be that employees are arriving late or working overtime. You might not have adjusted for seasonality, which can change from month to month. Marketing campaigns also rely on agent availability and bandwidth to handle the number of engagements.

Look at your staffing levels if you suffer from high call abandonment rates. If the abandonment is high before an engagement occurs, it could result from understaffing that led to customer frustration during a long wait. The opposite problem is a high employee idle rate; assuming there were no technology issues, this could indicate overstaffing.

PLAN FOR THE UNEXPECTED

- Look at your turnover trends.
- Think about succession planning and career development.
- Consider how the cost and speed of your hiring plans impact efficiency.
- Decide on the best times to coach and train around peak volume.
- Consider how new digital channels will affect your workforce planning.

Make the most impactful changes first

With a better understanding of workforce planning and its impact, you're ready to adjust your forecast and schedule while examining any other gaps revealed during this process.

Your AHT tells you how many interactions an agent can take during a shift. To reduce this metric, look at repetitive types of interactions that can be handled through automation – specifically bots.

Get agents in sync with your schedules and then continually monitor the schedules. You can start by verifying your forecast with historical data. For example, has schedule adherence and punctuality improved? To fill potential resource gaps, some companies are hiring “gig” workers. This takes the pressure off planners who don't have the budget for additional employees. It also enables their regular employees to focus more on customer experience than productivity.

TIP

Create shifts that rotate, typically on a weekly basis. This gives agents the opportunity to work all shifts, both desired and undesired, which balances the distribution of popular and less popular working times and days.

And when you select workplans, create a predictable pattern for the selected workplans and have your system rotate them weekly.

Measure your results

- **Employee Net Promoter Score** — Track changes and include more questions related to planning improvements.
- **Shift change requests** — In addition to capturing basic data, get feedback on explicit reasons. Changes could be due to more accurate forecasts or an easier process.
- **Queue wait times** — While call length might increase due to agent availability, this is still a major indicator of customer satisfaction.
- **Agent idle rate** — This is typically related to overstaffing; better forecasting should result in a lower rate. Before cutting hours, review your plan to see if you're scheduling the right agent with the right skills to address multiple types of engagements.
- **Customer satisfaction surveys** — If workloads are more balanced, agents should be offering better service and more effective engagement.
- **Call abandonment rates** — When this rate is high, it could indicate understaffing, especially when calls are dropped before an engagement occurs.
- **Monitoring** — Perform intraday, real-time monitoring to diagnose and solve problems faster. This will also give you a view into work performed by agents who work remotely.



Checklist

Before you fly:

- Gather current reports and determine if they're still relevant, valid and useful.
- Document required metrics, measurements and statistics with their current definitions, calculations and targets.
- Identify potential gaps in current and future reporting. Define your future needs and requirements.
- Identify sources of reporting metrics and review the level of effort needed to create and deliver reports. Focus on opportunities to automate.
- Verify the accuracy of calculations and data sources before you hold employees accountable for performance objectives.
- Document the time spent planning and forecasting.

By the end of the **RUN PHASE**, your attention to workforce planning is showing results. You've begun automating your forecasting process to improve service gaps. Productivity is up and initial feedback shows that agents are happy about the flexibility and scheduling options.

Phase 3

FLY: DIG DEEPER INTO YOUR DATA

Validate. Adjust. Repeat.

In the Fly phase, you can use AI to simplify workforce planning and extend your forecast length. You'll spend more time focused on understanding data and delivering value from it than moving it around. And you'll win with more accurate forecasting and scheduling. Flexible rules, time-off management and accessibility are just a few employee benefits.

USE CASE

AI gives employees full visibility into schedules and that transparency makes life a lot easier for Andy. He can forecast further ahead so that employees understand expectations. And his forecasts are accurate for staffing needs mapped to available resources. If Andy's teams need more help, he can bring in short-term workers and train them quickly using modules that cover specific tasks. While Andy used to feel like the slow and inefficient "bad guy" of planning, now he's making work life better for everyone.



Move from too slow to fast and accurate

Old forecasting approaches were manual and tedious, making them vulnerable to human error and inaccuracies. Those errors can impact budget and employee satisfaction.

An AI-powered solution can completely automate the forecasting process, including data collection and preparation. AI takes the information that planners enter and automatically detects operating hours, spots outliers and anomalies, and accounts for special events or dates that could cause variations from the norm. By choosing from dozens of algorithms and testing thousands of configurations with hundreds of thousands of iterations, AI can generate accurate forecasts in seconds — and automatically choose the most accurate model for optimal service to meet your unique needs.

By 2025, customer service organisations that embed AI in their multichannel customer engagement platform will **ELEVATE OPERATIONAL EFFICIENCY BY 25%**.

2021 Gartner Magic Quadrant for Workforce Engagement Management →

Tap into patterns using predictive routing

With a data-based understanding of customer segmentation and intents, you can form predictions about how many calls – or Instagram messages – you’ll get or how many times customers will call the billing department.

Using AI-powered predictive routing lets you match customers in real time with the most suitable agent to optimise your performance and business outcomes. Predictive routing does this by combining both historic and real-time customer, agent and interaction data – using machine learning to identify patterns in the data about which agents are suited to which types of work.



TIP

Run “what-if” analyses to estimate the impact of changes in call, staffing or performance assumptions. For example, you might have conflicting or uncertain estimates of call volumes for an upcoming marketing campaign. A what-if analysis would show you the staffing levels required to maintain service quality performance over a range of potential call volumes – giving you the insight needed to forecast and plan schedules.

Maximise automation for personalised scheduling

In the Fly phase, AI enables you to personalise schedules rather than manually creating and updating general schedules to fit any employee.

Planners can pre-populate schedules based on data insights and new information gathered via feedback. For example, have new employees automatically populate into your schedule. You can also make global adjustments to meet other needs, such as regular or ad hoc staff meetings.

AI plays an important role in **IMPROVING AGENT PRODUCTIVITY**. For example, it suggests knowledge content based on the customer's message and intent. This allows the agent to become a part of the AI content feedback loop for continuous optimisation.



Measure your results

- Monitor for anomalies and adjust for improvement.
- Review AI algorithms for accuracy, speed and effectiveness.
- AI-powered forecasting should consistently exceed 95% accuracy.
- Document time saved on planning and forecasting.
- Compare employee satisfaction and service-level goals with benchmarks established in the Walk phase.



“With **GENESYS WORKFORCE ENGAGEMENT MANAGEMENT**, we pretty much know how our day is looking regarding shifts, queues and staffing levels”.

Chip Sugrue, VP Customer Strategies,
American Heart Association

Checklist

- Generate load-based schedules and notify agents automatically.
- Solicit agent input for more ways to simplify their workflow and processes.
- Celebrate successes with ongoing recognition and rewards.
- Incorporate employee profiles and preferences into automated scheduling and forecasting.
- Use business intelligence in your forecast, such as marketing campaigns, industry trends and local job market competition.
- If you haven't already, deploy an integrated mobile app for agents.

As you **START TO FLY**, you'll find new opportunities in your AI data to create more meaningful engagement with your employees. Many organisations partner with a third-party company like Genesys to fully implement the Fly phase.

Conclusion

Planning for complex call centres is hard. Yet for decades, spreadsheets have been the primary tool of workforce planning. These old tools limited planners to control, fix past problems and use scheduling workarounds. Now, planning can be more predictable.

By optimising and automating many aspects of the workforce planning process, contact centres can schedule the appropriate employees for tasks at the appropriate times to facilitate business goals. This flexibility and agility also empower employees with better onboarding, training and education.

Genesys can guide you through part or all of the process to improve workforce planning and engagement. We've pioneered Experience as a ServiceSM to help organisations of all sizes provide true personalisation at scale, interact with empathy and foster employee and customer trust and loyalty – all through the power of cloud.

When you're ready to fly, Genesys can help you:

- Automate the capture of data to analyse
- Get your data AI-ready
- Set up ways to continually monitor and improve employee engagement

SPEAK TO AN EXPERT →



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Every year, Genesys® delivers more than 70 billion remarkable customer experiences for organisations in over 100 countries. Through the power of the cloud and AI, our technology connects every customer moment across marketing, sales and service on any channel, while also improving employee experiences. Genesys pioneered Experience as a Service™ so organisations of any size can provide true personalisation at scale, interact with empathy and foster customer trust and loyalty. This is enabled by Genesys Cloud CX™, an all-in-one solution and the world's leading public contact centre platform, designed for rapid innovation, scalability and flexibility.

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