

FORECAST FOCUS



A Guide to Workforce Manager Ratios

By: Tiffany LaReau, Human Numbers

The environment, equipment, infrastructure and manager experience all play a role in determining proper workforce makeup.

A question that I often hear is: "How many workforce managers do I really need for my call center?" The answer is it's based on the call center's size, the brand and configuration of the WFM software (including the absence of software), and the experience level of the workforce manager.

My career has taken me into very diverse call center environments, which has allowed me inside access to cultures with full funding to the best and biggest software vendors and teams of WFM personnel to tiny centers that could not afford automated software, nor the full-time person required to handle the tasks of forecasting and scheduling. During my experiences with these centers, I performed three separate test studies in WFM personnel capacity to determine the amount of output that can be reasonably expected from a workforce manager. Each study assumed the following ground rules:

1. The personnel in the workforce manager roles received all necessary training to perform the job expected of them.
2. The workforce managers were the right moti-

ational fit for the environment, and possessed the appropriate skill sets to meet the business' objectives.

3. The centers were equipped with all of the necessary hardware and software to handle complex application requirements, and the workforce managers had access to a supportive, functioning infrastructure.

Let's take a more detailed look at the three types of environments and their workforce ratios.

STUDY A: SIMPLE WFM SOFTWARE

My first study was performed in a call center that utilized the core components of workforce management software: forecasting, scheduling, tracking and reporting. The call center was a single site, using a single channel (phone only) with multi-skilled agents. It was a small call center (fewer than 300 agents) with simple needs and a robust software solution. The table on page 2 illustrates the configuration for this environment.

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Role	Ratio
WFM Admin to Agents	1:150
Forecaster to Forecast Groups	1:5
Scheduler to Agents	1:50
Supervisor WFM Roles to Agents	1:25

This configuration did not include any optional modules in place, such as real-time adherence, eSchedule Planner, etc.

STUDY B: COMPLEX WFM SOFTWARE

My second study was performed in a call center that utilized the core components of workforce management software (forecasting, scheduling, tracking and reporting), plus optional real-time tracking modules, an agent interface, an automated notification feature and a virtual location handler. It also fully optimized the automated features and Web reporting tools that were available. The call center was very large (more than 3,000 agents), and included multisite (international), multichannel (including an email data feed) and multiskilled agents. Their needs were extensive and unrealized, and the software solution was fully capable of meeting those needs.

By fully exploiting all of the automation tools that became available, the call center operation was able to produce higher amounts of output with fewer staff; however, the administration required to handle the configuration maintenance that accompanies this new technology increases. The following shows the workforce configuration for this environment.

Role	Ratio
WFM Admin to Agents	1:50
Forecaster to Forecast Groups	1:4
Scheduler to Agents	1:150
Supervisor WFM Roles to Agents	1:100

This configuration included all optional modules that were available at the time.

STUDY C: ABSENCE OF WFM SOFTWARE

I performed my final and most recent study in a call center that did not use formal workforce management software. Forecasts were generated using a variety of methods, sometimes changing month to month to determine the perfect fit for the center's current situation. Schedules were generated with a predefined set of rules (consecutive days off, windows of break times, etc.). Tracking and reporting functions remained solely in the hands of the call center supervisors. The centers were extremely small (always fewer than

35 people). Because their needs were simple, manual forecasting produced greater accuracy than single-method software solutions. The center achieved better results through manual scheduling that allowed managers to consider the special needs of the center and its staff.

Role	Ratio
WFM Admin to Agents	n/a
Forecaster to Forecast Groups	1:5
Scheduler to Agents	1:75
Supervisor WFM Roles to Agents	1:25

In this configuration, the typical responsibilities associated with schedulers (plan meetings, manage expectations, etc.) belong to the call center's supervisors.

What Is Everyone Else Doing?

I subscribe to many group discussion forums through LinkedIn, the Society of Workforce Planning Professionals and the International Institute of Forecasters. In these discussions, I continually come across questions related to WFM team size similar, such as:

- What is the industry standard for a workforce management team size?
- What is the industry standard for the number of forecast groups a workforce manager can support?
- What is the industry standard for the number of schedulers compared to agents?

The table below shows the range of answers to these questions.

Workforce Mgr.	Agents
1:	200
1:	150
1:	115
1:	50
1:	125-150

Results are not qualified by WFM software applications, automation abilities, nor the organization's complexity (multiskill, multisite, multilingual, etc.).

With such a broad range of answers, how can you determine the best ratio for your environment? This is where the experience level of the workforce manager plays a key role. Think about brand-new agents, fresh out of training. They may have higher handle times and, in fact, may be increasing their peers' handle times, as well,

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if they're interrupting their neighbors to ask questions. That learning curve pain also applies to a brand-new workforce manager. As they become more acclimated to the toolset, productivity should naturally increase, but there are some instances in which it will not.

Earlier, in the study ground rules, I mentioned that the workforce managers had to have the right motivational fit and possess the appropriate skill set required to meet the business objectives. Since I assumed the workforce manager role in the controlled test studies, this was accomplished. I was already fully trained, as well as properly motivated, because I deliberately chose a career in forecasting and scheduling. But what about someone who falls into that role accidentally? Or maybe even fell into their call center job by chance? Being a successful workforce manager relies on more than having an aptitude with computer software.

- A forecaster needs meticulous attention to details.
- A scheduler should be a great puzzle solver.
- A real-time manager should be open and flexible to change.

All three roles require the ability to visualize results and switch between goal-oriented and process-oriented from task to task. If the person doing the job does not have the proper mentality, then it is useless to benchmark their results against an effective workforce manager.

Not every call center is large enough to warrant a dedicated full-time-forecaster, plus a dedicated full-time scheduler. Sometimes it is necessary for the same individual to perform both roles. Typically, one of the functions will be favored over the other, but it's still doable. The problems usually begin when other call center functions start to intrude (for example, having a workforce manager also perform the duties of a quality monitor or a supervisor.) There are circumstances, especially in smaller centers, when a supervisor's role can be nicely integrated with the role of a real-time manager; however, the forecasting and scheduling functions are generally too specialized to be shared. Doing so may result in lower quality

WFM output or less frequent WFM output.

One of the most underrated factors to a workforce manager's success is the access they have to a supportive, functioning infrastructure. Timely reporting tools, working computers and archives that are there when you need them: these are the elements that we tend to ignore until they are broken. When these things are not in sync, it can also impact the workforce manager's ability to do their job. If you're a workforce manager who is in an environment where your needs are properly taken care of, reach out to your infrastructure support people and thank them. They need to know that they are appreciated, too. 🙏

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