

FORECAST FOCUS



Delivering WFM Reports without WFM Software

By: Tiffany LaReau, Human Numbers

**How to
create a
concise, yet
detailed
report for
informed
scheduling
decisions.**

Not every call center is large enough (or profitable enough) to justify purchasing and supporting software that requires heavy training and full-time maintenance to keep it running. But managers are still expected to know how many agents they need to meet their service goals, and they're held accountable for the results. In my last column, I offered tips for forecasting without the aid of workforce management (WFM) software. This month, I'll show you how to create a WFM report that conveys the forecasting and staffing information effectively and with the right level of detail to make informed scheduling decisions.

The contact centers that I typically work with don't have workforce management software or full-time workforce managers available to generate forecasts and schedules. As their "rented" workforce manager, my top priority is to identify, document and deliver the critical pieces of information that they need to run their call centers. I've found developing a weekly forecast and schedule packet to be the best approach. Combining my collection of interval/daily forecasts and charts with a short weekly strategy meeting to offer optimized schedule suggestions seems to provide the right balance of results and involvement.

What to Include in Your Report

When determining what information a supervisor

would need to make quick decisions about their week, the single qualifying question I ask myself is: "Is this information critical to meeting our service level?" If the answer is no, the data is excluded.

I strip out the things like occupancy percentage by interval, schedule efficiency deviations and other fun perks that I love to see, as a dedicated workforce manager. But they can create information-overload for a supervisor who has mixed responsibilities and who may only be able to spare a few minutes each day to think about forecasting and scheduling. I go for simple instead of impressive, and only include data elements that are completely necessary.

The WFM report breaks down into six main sections: Notes, Schedules, Net Staff Charts, Interval Forecast, Daily Forecast and Summaries. The **Notes** sheet contains details about upcoming holidays, special call drivers, upcoming agent absences and other topics that I want to store or bring up for discussion in the weekly meeting. Visually documenting these ideas and sharing them with the call center encourages them to keep me informed about things that affect their forecast and schedules. It's also a great way to document on a weekly basis. If you're already journaling in another location, it's best to stay consistent with your current method, but if you're not journaling at all, this

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is an easy way to start.

The **Schedules** sheet is a before and after picture of the original schedules compared to the optimized schedules that I suggest to achieve better service results. Optimized changes suggested in the “after” picture are highlighted. This worksheet does a great job of giving details about what is being changed. (See Figure 1.)

The **Net Staff** sheet contains two charts: a view of the planned staff using the original schedules, and a view of the planned staff using my optimized schedules (see Figure 2). Anything above the zero goal line means the call center is forecasted to be overstaffed, and anything below the zero goal line means they are forecasted to be understaffed. After I show the Schedules sheet (original/optimized schedules), I immediately flip to the Net Staff sheet, which does the job of selling the sug-

gested changes. When you can visually show pain points of understaffing being relieved, the change pill is easier to swallow.

The **Interval Forecast** sheet includes the same information in table and chart forms, plus a few important elements that deserve more dissection (see Figure 3):

- 1. Schedule Adherence:** The percent of time an agent is working during the scheduled time that they are assigned to work. I use the actual, not the goal, and reduce it straight out of the scheduled rate. I also use schedule adherence to cover any special maximum occupancy caps (e.g., Max occupancy = 85%, schedule adherence starts at 85% and goes down if adherence is even lower).
- 2. Non-discretionary Shrinkage:** Includes off-phone activities related to pres-

ence factors, utilization factors and true shrinkage that is not already captured in the planned staff. Vacation, preplanned meetings and other things that I know about in advance are actually reflected in the planned staff numbers. It's better to capture it in advance because I can apply it to the exact intervals that are affected; non-discretionary shrinkage is applied as a vague percentage across the week and is therefore less precise.

- 3. Scheduled Rate:** The cumulation of schedule adherence and non-discretionary shrinkage, reflected as “one minus the total %.” This can be fine-tuned even more if you also apply your schedule inflexibility rate (e.g., the percent of additional schedules you need because your agents require consecutive days off, the same lunch time every day, etc.)

- 4. Forecasted Volume:** The interval-level forecast that comes straight from my freshly reforecasted table on the Summaries sheet.

- 5. Average of Forecasted Handle Time:** Although the handle times are properly weighted, the end result is sometimes an average if there is more than one skill group used. This also comes straight from my freshly reforecasted table on the Summaries sheet.

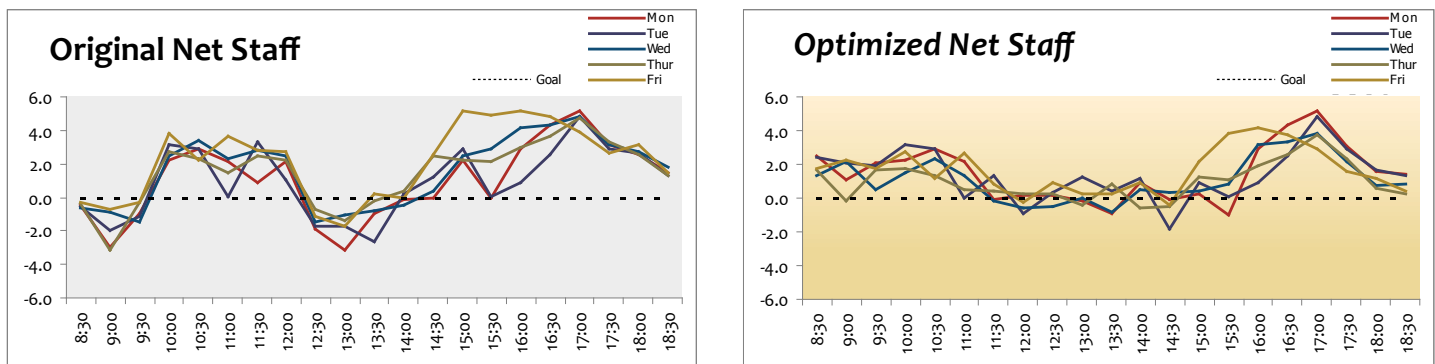
- 6. Optimized Planned Staff:** The number of scheduled staff based on the optimized schedule results.

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Figure 1: Schedules Sheet

Original					Optimized				
Name	Date	Start	Stop	Lunch	Name	Date	Start	Stop	Lunch
Bradley D.	3-Aug	08:30	17:30	12:30	Bradley D.	3-Aug	08:30	17:30	11:30
	4-Aug	08:30	17:30	12:30	Bradley D.	4-Aug	08:30	17:30	11:30
	5-Aug	08:30	17:30	12:30	Bradley D.	5-Aug	08:30	17:30	11:30
	6-Aug	08:30	17:30	12:30	Bradley D.	6-Aug	08:30	17:30	11:30
	7-Aug	08:30	17:30	12:30	Bradley D.	7-Aug	08:30	17:30	11:30
Jayme E.	3-Aug	08:30	17:30	12:30	Jayme E.	3-Aug	08:30	17:30	12:00
	4-Aug	08:30	17:30	12:30	Jayme E.	4-Aug	09:30	18:30	12:30
	5-Aug	08:30	17:30	12:30	Jayme E.	5-Aug	08:30	17:30	11:30
	6-Aug	08:30	17:30	12:30	Jayme E.	6-Aug	08:30	17:30	14:00
	7-Aug	08:30	17:30	12:30	Jayme E.	7-Aug	09:00	18:00	13:00
Jeremy M.	3-Aug	09:30	18:30	13:00	Jeremy M.	3-Aug	08:30	19:00	15:00
	4-Aug	09:30	18:30	13:00	Jeremy M.	4-Aug	08:30	19:00	14:30
	5-Aug	09:30	18:30	13:00	Jeremy M.	5-Aug	08:30	19:00	15:00
	6-Aug	09:30	18:30	13:00	Jeremy M.	6-Aug	OFF		
	7-Aug	09:30	18:30	13:00	Jeremy M.	7-Aug	08:30	19:00	14:30

Figure 2: Net Staff Sheet



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7. Total Required Staff: Use the forecasted volume and handle time to determine the workload in hours, then apply an Erlang method to determine the numbers of bodies in chairs that are needed, and then finally apply the scheduled rate to determine the total number of agents needed for each interval.

8. Total Net Staff: Subtract the planned staff from the required staff. A positive result indicates overstaffing, a negative result indicates understaffing and appears in red.

Each of these data elements are important because they are the assumptions in place that tell the story about why there is understaffing and overstaffing. My packet allows every assumption to be changed individually, so the supervisor can instantly see the impact to the forecast. This includes the planned staff, and there is a place for notes to document why the change is being made.

In addition to the numeric daily-interval tables, I also like to show two extra charts for added impact. The Daily Staff Plan chart compares Total Required Staff to Planned Staff by interval for a single day, demonstrating the points of overstaffing and understaffing more clearly. The Daily Forecast chart reflects the forecasted volumes and handle times by interval for a single day, justifying the reason for workload fluctuations. It does a good job of visually explaining why more people are needed periodically even though call volumes may be similar (due to variance in AHT).

The **Daily Forecast** sheet (Figure 4) is a single chart that shows an eight-week period of forecasted volumes. I highlight anything that has an impact over the entire day (like a federal holiday), but the real purpose of this chart is to give the supervisor an idea of how the current week is

behaving from a seasonal perspective. I highlight the current week just to make it easier and quicker for them to get the information they need.

My last worksheet, the **Summary Tables**, is for supervisors who prefer to play with the numbers themselves. I dislike the idea of locking anyone out of their own tools — the formulas I use are simple enough that a moderately skilled Excel user can get around with ease. (Even so, I'd still recommend keeping a backup copy as a template, just in case.)

There are occasions when your audience may want to dig in and challenge your schedule results. Don't feel defensive when this happens; this is always a good thing. If they find additional changes that can be made, it will help your service levels. They will also be more in tune with how the scheduling rules affect net staff (e.g., the same lunch times every day can sometimes hurt). The best-case scenario is that they find no improvement and gain appreciation for how hard your job is as a scheduler.

It has been a tradition to treat overstaffing as an expensive waste, something to be avoided as much as understaffing (i.e., a detriment to service). My approach to scheduling has drastically changed over the years, largely due to the reactions that I have witnessed from the agents who have to live with my scheduling choices. Today when I see a net staffing chart, I no longer just see expensive waste against service levels; now, it's also a vision of times where agents will be less-occupied, pockets where ad-hoc meetings and training can occur, and opportunities for schedule flexing. The forecast is necessary for preparing for the week, day and interval, but the reality is that people call in sick, show up late and have emergencies. All of these things will change the net staff picture. So today I limit schedule changes in an overstaffed interval to those that would move in a direction closer to the agents' preferences, and everybody wins.

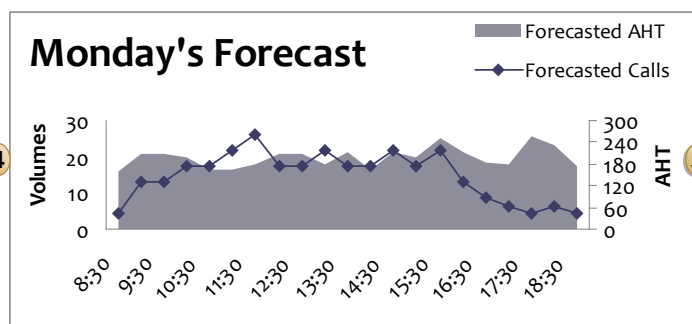
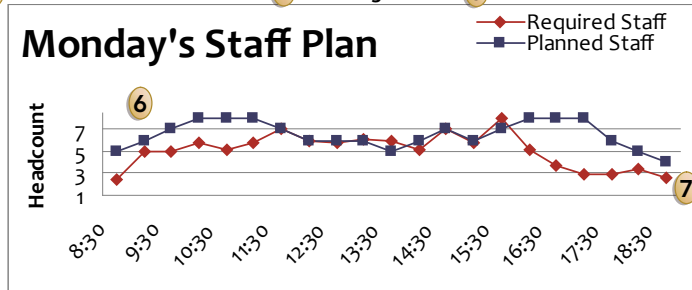
I deliver the packet to the supervisor 10 days in advance to give the

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Figure 3: Interval Forecast

Interval	Sum of Forecasted Volume	Average of Forecasted AHT	Optimized Planned Staff	Total Required Staff	Total Net Staff
8/3/2009	309	198	137	106	30.6
8:30	4	160	5	2	2.5
9:00	13	206	6	5	1.1
9:30	13	206	7	5	2.1
10:00	17	199	8	6	2.3
10:30	17	163	8	5	2.9
11:00	22	167	8	6	2.2
11:30	26	181	7	7	-0.1
12:00	17	209	6	6	0.1
12:30	17	208	6	6	0.1
13:00	22	177	6	6	-0.1
13:30	17	212	5	6	-1.0
14:00	17	164	6	5	0.9
14:30	22	213	7	7	-0.1
15:00	17	199	6	6	0.3
15:30	22	250	7	8	-1.0
16:00	13	214	8	5	2.9
16:30	9	185	8	4	4.3
17:00	6	177	8	3	5.1
17:30	4	255	6	3	3.1
18:00	6	231	5	3	1.6
18:30	4	173	4	3	1.5


1 Schedule Adherence = 86% 2 Shrinkage = 18% 3 Scheduled Rate = 68%



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agents enough time to adjust to any schedule changes, while still allowing me to reforecast the staff requirements using the freshest data available. This delivery schedule also allows me to pick up any last-minute vacation requests and incorporate those absences into an optimized schedule result. Your own delivery schedule may be more comfortable set to a longer or shorter range

I hope this information is helpful to others who find themselves in a position where they need to forecast and schedule, but do not have access to WFM software. I have found other forecasters and schedulers to be very generous in sharing their favorite tips and techniques with me, and would be honored to do the same. If you'd like a copy

of the weekly packet with the formulas and examples used in this article, please feel free to download it at <http://www.contactcenterpipeline.com/t-CCP200909.aspx>. 

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Forecasted Volume - Daily

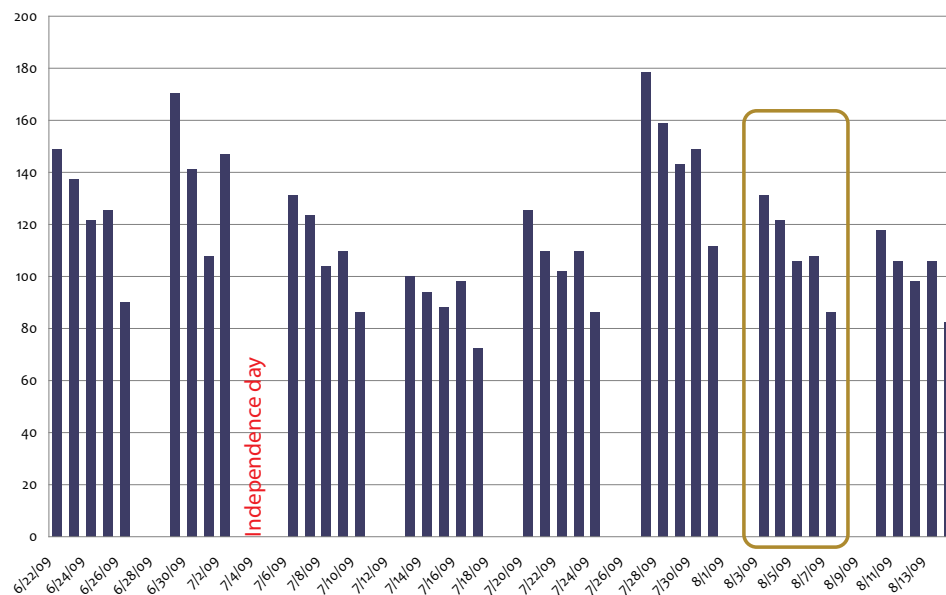


Figure 4: Daily Forecast Sheet

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Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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