

FORECAST FOCUS



Special Holiday Forecasting Factors

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A holiday survival guide for workforce managers: Six tips for handling end-of-the-year forecasting and scheduling exceptions.

Holidays can be a fun and exciting time in a call center. End-of-year holidays are typically the most active, and tend to coincide with positive events like parties, time off with friends and family, well-wishing gift exchanges between colleagues, and even some spruced-up seasonal decorating around the office. November, December and January are the three consecutive months that tend to be maxed out with special events for any U.S. call center using a federal holiday calendar.

An interesting phenomenon that happens at the end of the calendar year is vacation accrual and paid time off (PTO). In some call centers, the policy for accrued PTO is “take it or lose it,” and since most people reserve their PTO for emergencies, they end up with a lot of extra time off at the end of the year.

The current economic conditions have more call centers placing a maximum cap on the amount of vacation that can be rolled over from year to year, and that cap has begun to decrease. In many centers, after the vacation accrual reaches a certain point, no additional vacation may be accrued. This is a passive-aggressive technique that allows organizations to avoid paying out vacation time (think of frequent flyer miles expiring) or to force people to take the time off sooner, getting the \$\$\$ off their books. (Yes, that practice is in direct conflict with

service levels, considering the layoffs that are occurring.) Still, vacation time is a paid benefit, one that is earned from seniority, so it’s understandable that your staff would want to take advantage of it.

If the call center happens to be open during the holidays, there are additional considerations: Agents who work (maybe even at an overtime rate) must also get a compensation day off, but within the same pay period and within the same calendar year as the holiday that they worked.

What to Do When Holidays Become Too Special

Forecasting with special factors has its own unique set of problems: Holidays may not fall on the same week of the year (Easter), the same date of the year (Thanksgiving), or worse, the same day of the week of the year (New Year’s Day). Or there may not be a full year’s worth of history for each specific forecast group. Your call center may be 10 years old, but if your forecast group was created just four months ago as a result of adding Web chat, that doesn’t help much. Another variable occurs when special holidays do not repeat annually at the same rate (Election Day).

When any of these special forecasting and sched-

Continued on page 2

Continued from page 1

uling exceptions are combined with a large amount of holiday time in a 90-day period with extra vacation days, and then topped off with some PTO sprinkled in (sometimes requested at the last minute, driven by an email from HR threatening to take away any time that's not used up), it can turn an otherwise cheery workforce manager's attitude from festive to festering. To prevent that from happening, I'm sharing some of my tips and tricks to deal with special holiday factors:

1. DEVELOP A WFM CALENDAR

A WFM calendar is different from a calendar year, a fiscal calendar or a school calendar.

A *calendar year* starts in January and ends in December, and usually drives when vacation or PTO is reset. A *fiscal calendar* is also 12 months long, but companies get to choose the start and stop dates, and can vary the length between 52 and 53 weeks. Fiscal calendar selection is driven by the period that is most beneficial to determine tax liability and has nothing to do with service goals. *School calendars* end in summer and are aligned with the school year, so seasonality is driven by semester activities. Your WFM calendar should be driven the same way as a school calendar (although not necessarily during the same times of year).

As a conscientious workforce manager, you should already have your repetitive tasks entered somewhere, with time estimates for each and deadlines. This will be the tool that you use to identify when your peak and low times occur. It doesn't make sense to reserve November/December as the time to work on next year's long-term forecasts. There may be last-minute information that cannot be collected before these months, but the majority of work to develop the plan should have already taken place. Schedule time for administrative tasks and heavy lifting during the slower months.

2. TAKE VACATION PLANNING SERIOUSLY

If your agents and supervisors are in the habit of taking and/or approving vacations and notifying you as an afterthought, you

need to correct this behavior. The only time this might be acceptable is if your center is not held accountable for achieving service level goals. For everyone else, vacation and PTO has to be treated with the same planning mindset as your intraday forecast.

Begin by putting in place a policy that defines how much advance notice is required for time off. Sync time-off requests with accrued PTO to eliminate unnecessary administrative work related to "over-requesting" time off. Then proceed to publish the days when you are expected to be overstaffed and encourage agents to take advantage of these ideal days for time off. Use positive reinforcement in your WFM vacation planning system and you'll find that you get good results.

3. AVOID BACKWARD HOLIDAY FORECASTING

One of the biggest dangers around holiday scheduling is the impulse to build the schedules based on the available agents who are working, rather than the holiday call drivers. This generally happens when a workforce manager receives a list of agents who are working, then enters their normal schedules and tries to back into the requirements using those schedules, which is not efficient for the holiday. If agents are working on a holiday, they may be receiving extra overtime pay or a compensated day off (or both).

Do not treat this day as a regularly scheduled day — generate a separate set of schedules and be prepared to have agents work different shifts, if necessary. The contact arrival patterns will be different on this day anyway, so the idea of working a "regular" schedule is out of the question. Build the schedules in the same order — start with the largest spans first, do the smallest ones last, and then assign the agents after the schedules are built.

4. BEST HOLIDAY FORECASTING CHEAT

Here is my secret for effective holiday forecasting: Pretend it's a different holiday. For instance, if you need to forecast for Martin Luther King, Jr. Day in 2010, and you only have six months of historical data, just call up Labor Day. It always

Continued on page 3

Continued from page 2

occurs on a Monday. While you can't use the absolute volumes as a straight copy/paste, because January is a different seasonal month than September, you can use the day-of-week percentages, and apply that to a typical January week. Be sure to consider the weekend before the holiday, too, and especially the Friday before the weekend (turning it into a four-day weekend).

This same concept can be applied to holidays that fall on different days of the week. For example, when Christmas Eve/Christmas Day or New Year's Eve/New Year's Day falls on a Thursday/Friday combo, call up Thanksgiving. Always be prepared to make some manual adjustments to really perfect it, but then you need to be prepared for that when you have seven years of historical data, too.

5. ADVANCED HOLIDAY FORECASTING

Measure the rate of impact for each holiday. A call center that frequently adds, changes and deletes contact groups leaves their workforce managers in the position of forecasting with brand-new sets of history, which makes it difficult to accurately forecast for holidays.

In this case, it is necessary to rely on similar groups' behaviors. But, since not all groups are completely equal, measuring the rate of impact is another way to balance some of that inequality.

The rate of impact measures two distinct pressure points:

- How long does the holiday's impact last (in days)?
- How deep is the holiday's impact (in volume)?

The result can be shown mathematically or as degrees of variance, like "short-long" and "light-moderate-heavy." The group's industry comparison doesn't need to be the same, but the length and depth of impact should sync up.

6. DOCUMENTATION IS A BEAUTIFUL THING

After you experience a hectic holiday schedule, be sure to journalize everything you did that worked and why it worked. If you sketch out the process and save it in your WFM Journal (you have one, right?), you won't have to reinvent the solutions or struggle with trying to remember what you did the last time that eventually worked out so perfectly. It can also help you start the holiday process a little earlier, planning to get the hard stuff out of the way first, which makes more time for you to return to your cheery normal self. 🗣️

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