

FORECAST FOCUS



The Workforce Manager's Role: Tasks and Reports

By: Tiffany LaReau, Human Numbers

In the second half of this two-part series, we examine the recurring tasks and reports that workforce managers produce.

In last month's column, I touched on some of the responsibilities, qualifications and roles typically associated with a workforce manager. If you're a contact center leader seeking a qualified workforce manager, or are currently considering WFM as a career, identifying the right motivational fit for this job is important. For instance, you may find someone (or be someone) who excels at intraday management, but who isn't the best forecaster or scheduler. While the intraday manager needs to be highly personal and reactive, the forecasting and scheduling process involves heavy data analytics and balancing.

The table below offers a view of the typical recurring tasks that workforce managers must oversee on a timely basis. (The guidelines assume that the manager has a dedicated forecaster, scheduler or both reporting to him or her.) As you can see, exceptional time management is essential to excel in this position.

Types of Reports

Reporting is a critical responsibility of a successful workforce management department. The first trick is matching the right content to the right audience level. The second one is maintaining a simple and

precise organizational archive for all reports.

In a contact center with a dedicated forecaster and scheduler, the following tactical reports are typically produced by those positions:

FORECASTING REPORTS

The forecaster has the heaviest reporting needs, generally working with piles of number-intensive data. He or she will need a lot of storage space (doubled, once the backup plan is in place). Most of the reports generated will be of no interest to anyone else in the call center except the forecaster, whose report set should include:

1. Raw data reports
2. Distribution reports — one each for time of day, day of week, week of year, month of year, year over year, and another for special distribution sets
3. Holiday, daylight saving time and event calendars
4. Forecast accuracy results
5. Interval forecasts for the next eight weeks
6. Daily forecasts for the next eight weeks

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7. Short-term weekly or monthly forecasts for the next three to six months
8. Long-term monthly forecasts for the next three to 18 months
9. A baseline forecast to compare progress and movement
10. Special "what-if" forecasts
11. Alternative forecasts showing results from different methodologies
12. A forecast journal that captures notes (one for each forecast group)

All of these reports are produced in both table and chart form. Unless there is some strange data anomaly that the forecaster wants to point out, the workforce manager is only going to be interested in seeing the forecast accuracy results (#4), interval forecasts (#5), daily forecasts for a heads-up on what's coming (#6), and a long-term forecast to share with the executive team each quarter (#8). The scheduler is only going to be interested in the interval forecast (#5).

A typical work schedule for a forecaster to execute his recurring tasks would be:

- Reforecast monthly data every month
- Reforecast daily/weekly data every two weeks
- Reforecast interval data once a week
- Collect and clean data once a week

Even though interval data is forecasted for eight weeks out, the scheduler and workforce manager who run the intraday desk are going to benefit most by receiving the freshest, most recent forecast; not one that was generated a couple of months ago. When using this recurrence schedule, every interval forecasted should go through at least eight reforecasts before putting final results into production. That leaves a lot of opportunity to catch mistakes before the forecast becomes live.

SCHEDULING REPORTS

These reports are much simpler and very straightforward. They are tactical, and almost every one of these reports will be of interest to the workforce manager on the intraday desk, as well as the supervisors and agents themselves:

Recurring Tasks for Workforce Managers

Frequency	Description
Real-time	<ul style="list-style-type: none"> ▶ Monitor schedule adherence, taking action when thresholds are exceeded (too many people out at the same time or too much overstaffing is occurring) ▶ Receive and reply to schedule exception and flex-time requests
Intraday	<ul style="list-style-type: none"> ▶ Check service performance and forecast accuracy at recurring intervals: immediately upon arriving, mid-morning, when you return from lunch, mid-afternoon, 30 minutes before leaving for the day. If calls are abnormal, take necessary action. ▶ Monitor systems to make sure services are up and running 2x/day
Daily	<ul style="list-style-type: none"> ▶ Optimize schedules (start/breaks/lunches/stops) for tomorrow ▶ Post tomorrow's revised roster ▶ Review yesterday's raw data, validate that it is complete ▶ Review yesterday's schedule adherence, address anomalies
Weekly	<ul style="list-style-type: none"> ▶ Forecasting strategy session with forecaster and scheduler: <ol style="list-style-type: none"> 1. Analyze last week's forecast accuracy 2. Review current and new call drivers, clean data 3. Plan upcoming schedule changes/solutions ▶ Publish next week's schedules
Monthly	<ul style="list-style-type: none"> ▶ Review last month's handle times ▶ Check growth rates ▶ Meet with Sales/Marketing to probe for info about upcoming events
Quarterly	<ul style="list-style-type: none"> ▶ Quarterly forecast review with management team <ol style="list-style-type: none"> 1. Collect historical shrinkage data 2. Validate off phone activity for past three months ▶ Share updated annual forecast with executive team
Annually	<ul style="list-style-type: none"> ▶ Present next year's annual headcount report to executive team ▶ Meet with HR to get information about next year's benefit changes

- **Schedule Roster** includes the details for each agent's shift — when they start, go to lunch, go on break, what days they are off, etc.
- **Net Staff Report.** Net Staff = Required Staff minus Scheduled Staff. Any result greater than zero means overstaffing; less than zero means understaffing. This is a very important report for the workforce manager to use when managing the intraday desk, or when determining if flex time can be granted.
- **Intraday Report** is generated by the scheduler (since it uses a combination of the original forecast and the resulting planned staff). This report is critical to running the intraday desk. It should include forecasted calls, forecasted handle

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time, planned staff, required staff, net staff and a section for notes. It's better when there is a way to make adjustments to the plan (e.g., show what happens when someone calls in sick).

- **Schedule Efficiency Report** measures the percent of understaffing due to schedule rule inflexibility. This percentage then goes into the long-term model to bump up the workload requirements to account for the fact that schedules require limits and boundaries. The scheduler is the person who has access to this metric, and it is valuable to the workforce manager responsible for developing the annual headcount plan.
- **Agent Ranking Report** should be published on a regular basis so the supervisors and call center managers can validate that the current ranking order is correct.

WORKFORCE MANAGEMENT REPORTS

Workforce management reports pull together all of the forecasting, scheduling and performance data into an overview that reveals how effectively you're managing your resources. WFM reports include the following:

1. **Weekly Dashboard.** Ideally, this goes to a central location that everyone can access whenever they want, with archived data for previous weeks. The weekly dashboard is a one-page review of how the call center performed last week, and if you can manage an automated data feed, it makes this report that much easier to produce. Although the dashboard idea is to provide "one easy view," it should be limited to one page per group. Consolidating the information could accidentally hide something you want to emphasize. Some of the key metrics to be included are:
 - a. Forecasting: Forecast accuracy, actual volumes, handle times
 - b. Scheduling: Schedule adherence (as a percentage), shrinkage percentage
 - c. Performance: Service results, abandon percentage

d. Financial: (insert your KPIs here)

2. Employee Schedule Satisfaction Results.

Every time there is a major schedule change, have employees complete a survey right before and after the change to measure the improvement in satisfaction levels.

3. Strategic Planning Reports. These reports are designed for the executive audience, and include three sections: volumes, shrinkage and headcount planning. Volumes contain both phone (handled vs. abandoned) and non-phone contacts. Shrinkage covers utilization, occupancy and presence factors. Headcount planning shows the required staff by workload hours, by total required hours and includes a recommendation on when to hire additional people.

4. Your WFM Diary. This is your personal report — one that you may never need to share with anyone else. Still, it's good to have in case you ever decide to change jobs and want to bring someone up to speed. It's also a good practice to store information about the progress of your own accomplishments and successes throughout the year.

Where to Find More Information

Workforce management is a rewarding, fulfilling career. Individuals who succeed in this position are organized, detail-oriented and able to communicate well with others. If you decide to pursue a WFM professional education program yourself, or would like to pass along some great resources to your WFM team, check out my list of top resources for information, training and networking.

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External WFM Resources

The following are excellent sources for WFM information, training and networking:

- **Society of Workforce Planning Professionals (SWPP)** is a members-only organization solely devoted to WFM. Membership costs \$295 per year, and this buys you access to their Web site, quarterly newsletter and a discount registration to their annual conference, held in Nashville at the Opryland Hotel each year. Every workforce manager should become a member of SWPP. Attending the SWPP convention is a great way to get massive training in a short amount of time and learn about best practices in the WFM community.
- **WFM User Groups.** If you use workforce management software, seek out the user groups with other members who use the same applications. They are usually free to join, and provide a place to participate in discussion forums, access user documentation and get product updates.
- **WFM Vendors' Annual User Conferences.** Most WFM software vendors host an annual conference for their users. Make it a point to attend, be seen, and be heard. Introduce yourself to everyone you meet on the vendor's staff, and attend any session that gives you a chance to share your wish-list items with them.
- **LinkedIn Groups.** LinkedIn is the business equivalent of Facebook and MySpace. The user groups, which are strictly moderated, can be a valuable source of information. The other free-for-all groups tend to be heavily inundated with recruiters and spammers. However, if you apply the right filters, it can be a great source for free Webinars, training and staying up to date with your network of other WFM professionals. The groups change constantly, and the easiest way to find the ones that could be a good fit is to create a LinkedIn profile, make connections (start with me if you want) and then check out the groups that your contacts subscribe to. A second option is to just search for "workforce management" in LinkedIn under the Groups category.
- **CRMxchange** is typically focused on non-WFM technology for the call center, but occasionally they will offer some nice tidbit or free Web session about something WFM-related. The trick is learning how to quickly scan through their emails to get to the juicy parts.
- **International Institute of Forecasters (IIF)** is another members-only group. Membership is cheap (\$120 per year) and you receive the *International Journal of Forecasting*, *Foresight: Applied Forecasting* publication, and the Oracle newsletter, published four times per year. These publications are very information-intensive, and incredibly detailed about the progress with modern-day forecasting techniques. Very little content is specific to call centers, yet their theories and math are still relevant to the forecasting role of the WFM desk.
- **The Call Center School** publishes QuikStaff, my favorite free staffing calculator, along with a ton of articles, white papers, tips and a nice bookstore. *Call Center Staffing, The Complete, Practical Guide to Workforce Management*, by Founding Partner Penny Reynolds, remains one of my most-often-used guidebooks to this day.
- **Contact Center Pipeline** is published monthly. It includes content related to everything call center, with a monthly column on workforce management (by yours truly!). 

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ABOUT US

Part 1 of the series is available at: <http://tinyurl.com/CCPWFM-Part1>



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