

FORECAST FOCUS



WHAT TO DO WHEN **Everyone Hates Their Schedules**

By: Tiffany LaReau, Human Numbers

You can rarely make everyone happy with their schedules, but you can make changes that appease the majority with this six-step process.

In a contact center environment, schedules are a key contributor to employee satisfaction — or dissatisfaction. When someone is required to work a shift they hate, the natural response can be anger or bitterness. Those feelings often materialize later in small paybacks, like tardiness or inflexibility to other needs of the center. Sometimes it even escalates into more menacing behavior — I have heard horror stories about workforce managers having their vehicles keyed and their tires ruined.

While it is the workforce manager who has the responsibility of assigning the best optimized schedules to fit the service goals at the exact best times, the way it is handled can go a long way toward building bridges instead of burning them.

Steps to Creating Schedule Harmony

So what do you do when everyone hates their schedule? You can start over from scratch and do it better this time. The following steps outline a process that can work for you.

CONDUCT AN EMPLOYEE SCHEDULE SATISFACTION SURVEY

Limit your questionnaire to no more than 10 to 12 questions about the schedules for the group, the individual's schedule and the schedule selection process. Make sure that each question includes a response with a numerical ranking so that you can assign a value to the total scores (e.g., 1 = bad, 5 = good). Include three lines

at the end for comments. Allow an option for employees identify themselves or remain anonymous and set a deadline for replies.

A schedule satisfaction survey will serve two purposes: 1) You can use the data to identify popular scheduling desires, and 2) after you develop your new-and-improved scheduling process, you can resurvey the staff (using the same questionnaire) and compare the new values, which will produce an improvement percentage to demonstrate your success.

PUT TOGETHER A SCHEDULE FOCUS TEAM

The schedule satisfaction survey probably will generate some buzz, along with thoughts like, "You know what I would do if I was in charge of schedules..." This is a good mindset for people on your schedule focus team. You can ask for volunteers or have people formally apply to participate. Be sure to include a short interview process and ask each candidate to describe why they are a good candidate for this team. Look for problem-solving, brain-storming types who are going to have the time to actively participate. Current schedule satisfaction should not be a prerequisite; in fact, a diverse group would offer better insights. The group size should include a good representation for everyone.

In your first group meeting, you'll want to brainstorm scheduling constraints, desires and options. White boards are great for this type of session. Use one board to list the scheduling restrictions. This

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would include things like service goals, operating hours, team sizes and required staff by intervals, day of weeks, etc. It is probable that these restrictions are mandatory and should be identified as constraints. On another board, list the staff's schedule desires collected from the surveys. This would include things like daycare, school, traffic, etc. Use a third board to brainstorm scheduling rule ideas from the group. This can relate to consecutive days on/off, 4x10 versus 5x8 shifts, rotating weeks, weekend coverage, flexible or part-time shifts, etc.

The goal for the session is to get consensus on just how flexible the employees are willing to be after understanding the constraints. You may need to plan time for a short lesson on required staff versus planned staff (net staff), and simulate the impact that understaffing has on service goals. During this exercise, the schedule focus team members typically will begin shifting their perspective to the role of the scheduler.

KEEP EMPLOYEES INFORMED

Once the schedule focus team gains consensus, employees need to be kept informed about the team's progress, the decisions that are being made and why. Delegate these communications to the schedule focus team members.

Besides keeping your current employees in the loop, you'll also want to communicate your efforts to your HR group, or whoever is responsible for interviewing and hiring contact center staff. If a new-hire understands that his schedule isn't automatically going to be 9-to-5, that's one less disappointed agent you have to deal with later on. Again, delegate this communication responsibility to someone on your focus team — it will help to keep them engaged with responsibilities.

RUN SIMULATIONS OF YOUR NEW SCHEDULING SOLUTIONS

After your team identifies new scheduling ideas and solutions, it's important to simulate them with a test run before going live. Sometimes things that look great on paper won't work out the way you expect them to, and that goes double for schedules. Bring the team back together to look for ways to poke holes in the new shifts. Test the schedule effectiveness (does it give adequate coverage in all the right places?), and also look at its impact to the service goals. If you don't get the results you need, the group will need to revise the plan until it's something that the agents, managers and your customers can live with. You can also use this opportunity to introduce the idea of schedule-change frequency, especially if your center has a lot of seasonality that demands more frequent schedule changes. Treating the entire process as an education opportunity will make resistance harder to justify.

ASSIGN SCHEDULES

The second phase for your focus team is to work on schedule assignments. The group now needs to decide on a fair process for matching shifts to employees. If your center is a multi-skilled environment, there may be little choice in the matter because of the way the coverage rules work (meaning, you have to have at least one person staffed in every skill).

Before the assignments start, it's advisable to collect a Schedule Preference Form from everyone. This is another task that can be delegated to the team. The team should design the form as a group, then each person can be responsible for distributing/collecting the forms for their area. Team members can also serve as the "Schedule Champion" for their areas, a person

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Six Basic Flexible Schedule Examples

1. **Mix full-time and part-time shifts:**
Assign full-time shift first, then fill in gaps with part-time.
2. **Cover missed time with make-up time:**
When someone wants to leave two hours early, have them work two extra hours in the same pay period, but choose the makeup time to occur when you're hurting.
3. **Consider non-traditional lunch periods:**
Offer a shopping/gym lunch choice, allowing a two-hour lunch by arriving/leaving a half-hour extra. Test this as one-day a week to start.
4. **Switch up break times:** Having different lunch times each day of the week may be easier for employees to handle instead of different start times each day.
5. **9-to-5 isn't the norm anymore:** 8x5, 4x10, 9x4 + 1x4, 3x12.5, etc. The possibilities for shift combinations are wide.
6. **Open up schedule trades between agents, including long-term trades** (also known as "rotating schedules" — you work early one week; I work early the next; then flip.)

The success factor isn't in the method chosen, but the amount of acceptance it will have with the entire group.

Human Numbers' Approach to Scheduling

Happy Employees	Happy Managers	Happy Customers
<ul style="list-style-type: none"> ▶ All schedules are based on agent preferences ▶ Schedules only have to flex when net staff demands it; otherwise, everyone works their desired shift 	<ul style="list-style-type: none"> ▶ The completed schedule results arrive in weekly packets, with time off and off-phone activity strategically inserted into the high net-staff periods ▶ Managers or schedule focus team decides on assignment rankings 	<ul style="list-style-type: none"> ▶ Required staff is built on a highly customized forecast ▶ Having the right people working at the right times means less wait time

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for the agents to go to when they want a point of contact. Be sure to set deadlines to ensure that the process doesn't become drawn out.


Deal with the schedule exception cases first — those people who are given special schedules to accommodate their personal lives, such as school or daycare. Anyone who is given an exception by HR or management needs to be assigned their schedules first; otherwise your schedule efficiency can get blown away. I agree, this is unfair to the rest of the team, which is why I call it "exceptions." But if you don't deal with at the beginning,

by the time you get to them, their exception schedule may no longer be available, which means you could end up understaffed in the wrong place.

There are many options to choose how schedules are assigned: by seniority, by performance or a hybrid are three popular examples. The success factor here doesn't live in the method chosen, but in the amount of acceptance that method will have with the entire group. When dealing with unhappy agents, the goal is to make a change that appeases the majority, because you can rarely

make everyone happy.

CONDUCT A FOLLOW-UP SURVEY

After the schedules are developed and rolled out, send out the schedule satisfaction survey again. Be sure to use the exact same questions so that you can have a nice "before" and "after" result to share with your focus team for a job well done (and your managers for your performance review). You are likely to see some level of improvement, and since this is purely a measurement of happiness, even a small bump deserves a reward. 

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