

FORECAST FOCUS



The Workforce Manager's Career

By Tiffany LaReau Human Numbers

So you want to be/need to hire a workforce manager.

The workforce management career is a great choice in the contact center for many reasons. The nature of the work is rewarding because you get to see tangible results from your efforts. The role of the scheduler is valuable because you have the opportunity to bring positive impact to both your agents and your customers. The work is satisfying because it requires just the right level of meticulous detail-oriented organization without excessive stress. And, the tasks are predictable and repetitive, yet the industry is still so new there's always room for innovative improvements, so the job doesn't get a chance to feel "stale" for the initiated individual.

Some organizations hire a workforce manager to handle all of the forecasting and scheduling duties for a specific location or group of calls. Others hire a segregated forecaster who only does forecasting, a scheduler who only does scheduling, and an adherence manager (aka "command center" role, or even delegate that function to their supervisors). Forecasting, scheduling and adherence are all gears in the same wheel, along with capacity planning and long-term strategy models. A strong workforce manager will be an expert in all of these areas, even though they may prefer one task best. A scheduler cannot do their job well unless they are using a good forecast; so when they thoroughly understand the forecasting process (and can reproduce it), their scheduling output can be validated with high confidence levels.

The Workforce Manager's Job Description

The three key elements of the workforce manager's job requirements are:

1. Produce historical reports, interpret what they say, normalize the data, organize it and store it.
2. Using that history, generate an accurate forecast showing vol-

ume, handle time and required staff using specific service goals. A micro-forecast (intraday) and a macro-forecast (monthly, annually, etc.) will be necessary.

3. Create schedules from the forecast that are compliant with the company's policy, and are accepted by the agents who must work them.

Each of the three key elements repeat on a regular basis with the recurrence dictated by how often the volumes and agents' needs fluctuate. While there may be other responsibilities, too, like reporting, coaching and "special duties as assigned," the three listed here are the basic building blocks of the job.

Identifying the Right Workforce Manager Candidate

The more career-centered workforce managers I meet, the more alike I notice that we all are—we share the same traits, with experience level being the main difference. That is because, regardless of the industry, the size of the call center or the office locale, workforce managers share the same typical experience set. We have all struggled with data collection, forecast accuracy and the best way to persuade agents to adhere to their schedules. And, not surprisingly, workforce managers tend to really enjoy the work and like what they do. At networking events, you'll find that the individuals sitting at the WFM tables are the ones sharing stories about how much fun their projects are, and are caught bragging about their successes. WFM people also make the best case studies, because the accomplishments are so meaningful.

So, if an experienced interview candidate walks in and lets you know that their career is in workforce management, you can feel

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better about them having the right motivational fit. They already know what they're getting themselves into. Otherwise, you will need to ask questions to identify the right level of knowledge, skills and abilities, so that you can hire someone with the training and experience that you need. Some key requirements are:

1. Expert-level background using MS Excel
2. Strong organizational skills
3. Excellent communication skills and ability to communicate across multiple channels
4. Demonstrated ability to create a forecast, measure forecast accuracy and readjust a forecast when necessary
5. Demonstrated ability to generate optimized schedules, and understands scheduling templates, shift limitations and compliancy issues

Another optional requirement is experience using your specific WFM vendor's product. Not all workforce managers are experienced in all WFM software applications. If you use IEX, for example, and hire someone with Aspect experience, you may still have to invest in training to bring them up to speed. Additional training to get acclimated with your specific ACD reporting software may also be needed.

Even if you already have WFM software, your workforce manager should have the ability to create strategic long-term capacity plans using macro-forecasts, as well as build forecasts outside of the software and import them. Excel is where all of this happens.

If you are interviewing someone who is already experienced with workforce management, the extra training needed to bring them up to speed on your software, your ACD and your individual contact center's culture should be short-term and minimal.

Hiring someone without any WFM experience is risky unless you are willing to invest the time and dollars necessary to supply them with the training background to do this job. Even a candidate with a bachelor's degree in business management and

five years' experience in an operations department is going to need training, and they still may not be the right motivational fit. The WFM job is a good fit for a specific type of individual (what we call "puzzle people")—tasks that seem fun and satisfying to them could be a nightmare for someone who is better suited for a leadership role or who craves other people's praise.

A Few Tips on Searching for a WFM Job Online

Workforce management jobs are available today, and new ones are showing up all the time. However, the job search process for WFM is a little tricky because of the terms "workforce" and "manager." Some search engines treat them independently, so your search result may include every job

Those who excel at WFM are unique individuals—a look at the traits and goals for success.

with the word "workforce" and every job with the word "manager." Using syntax with a plus symbol (+) can alleviate some of that nonsense.

Another helpful tip is to consider phrasing. Some variations are:

- Workforce Manager, Workforce Management, WFM
- Forecast, Forecaster, Forecasting
- Schedule, Scheduler, Scheduling
- Workforce Planner, Workforce Planning

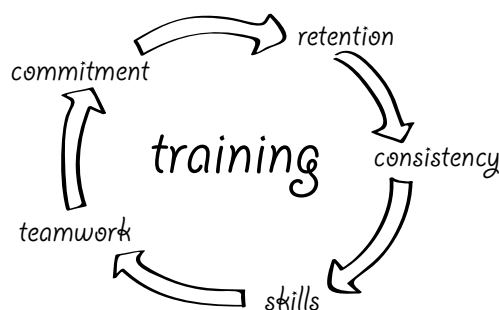
One is from human resource departments that have started referring to themselves as workforce

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managers. The term "workforce developers" also interferes with the job search. I have even seen workforce director nose its way into my search results.

The major online job search engines will contain postings: HotJobs, Monster, Bing, and Yahoo. Also, utilize your local newspaper's classified ads online. And, many LinkedIn groups have job boards now. To the right is a snapshot of the ones recently listed on *Contact Center Pipeline's* job board.

Evaluating Your Workforce Manager's Performance

After the career choice has been identified, the interview is done, the position has been filled, and the workforce manager is going about their happy business day after day, the next thing to consider is the performance evaluation. A workforce manager's review should be unique in the contact center. Although everyone is working toward the same company goal, the criteria used to grade agents will not determine how well the workforce manager is doing their job.


The following are the performance goals and measures you can use to gauge how effective your workforce manager is:

1. Your data's history is a complete and thorough story that describes the events happening

in your center at any given point, with all anomalies accounted for.

2. Your forecasting methods are up-to-date and reliable. Forecast accuracy is used as a tool to guide methodology choices. Reforecasting occurs at the right times.


3. Your schedules are accurate, compliant and result in a fully optimized net staff. The schedules are accepted by the agents, who have buy-in on the scheduling process.

There are additional elements that can also be included. For example, the weekly, monthly and annual capacity plans should reflect proper seasonal assumptions. These items are easy to track in the workforce manager's role because it is necessary information when producing the required staff forecast. 

Jobs you may be interested in beta

 **Workforce Management Manager**
CSN Stores - Boston, MA

 **Consultant, Workforce Planning**
Kaiser Permanente - Oakland, CA

 **Workforce Analyst Job**
ADP - GA, Alpharetta

 **Workforce Development Director**
Aletheia House - Birmingham, Alabama Area

 **Solution Consultant - Healthcare (West)**
Kronos - Remote / Home Office, CA

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Online Resource

This issue is available online at: [January 2011, Contact Center Pipeline](http://www.contactcenterpipeline.com/t-CCP201101.aspx)

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