

2008 ORCAA Meeting

Workforce Management and Call Center Management
The Love / Hate Relationship
Presented by Ross Baldwin
March 27, 2008

ING  **DIRECT**

About ING Direct and Me

- **Director, Sales and Operations Support , ING Direct**
 - WFM services for 300 staff
 - Serve 3 business lines – Deposits, Lending, and Mutual Funds
 - 3 locations – 2 in Toronto and 1 in Ottawa
 - Team consists of Workforce analysts, real time analysts and reporting analysts
- Previous employers include Delta Hotels, Rogers, Clearnet and Telus
- Passions
 - Travel
 - Wine
 - Sports
 - Investing

Overview of WFM

Ensuring you have the **right people** in the **right place** at the **right time** to handle your contact volume efficiently and with quality

While part of getting the right people in the right place at the right time is **science** – successfully utilizing WFM tools and formulas to forecast and staff – a healthy amount of strategy and even **art** is required to achieve ideal results

Have you heard these lines before ?

- “Workforce won’t let me meet with my Associate “
- “ We don’t get enough coaching time with our teams “
- “ Marketing ran the ad and didn’t tell us again “
- “ The Manager did not tell us she was taking her team offline for a meeting “
- “ I have been here for 6 months and I still have to work evenings “

WFM and Relationships

Marketing

- What are we launching ?
- When are we launching ?
- What is the expected impact ?
- What channels are going to be impacted ?

- **Human Resources**

- Guidelines and policies
- Recruiting and Termination
- Development
- Payroll

- **Information Technology**

- Systems support
- Enhancements
- Development and Implementation

- **Facilities**

- Workspace
- Office Environment
- Business Continuity

WFM and Relationships

Call Center Management

- Are you with us or against us ????
- The key to a successful call center is everybody working together
- WFM team must educate management and staff
- Do not let WFM act like they perform magic
- Call center management must hold managers accountable for decisions
- Decisions must be consistent
- Both teams have the same clients – internal and external

The Big 3 of WFM (Automated or Manual)

Forecasting

- Historical data gathering is critical
- Call volumes by :
 - Monthly
 - Weekly
 - Daily
 - Interval
- Average Handle Time
 - Talk time
 - After Call Work
 - Average Speed to answer
- Staffing Requirements

Scheduling

Tracking

- Shrinkage
 - Vacation
 - Absence
 - Coaching & Meeting
 - Training
 - Unproductive and Other (the universal catch all)
- Reporting

Shrinkage Tips

- Use the number of weeks that an agent works (net of vacation) to calculate your shrinkage
 - Example – 30 minutes X 5 days X 50 weeks = Break time
 - Do not use 52 weeks !

- Schedule Reqd = Base Staff Reqd divided by (1 – Shrinkage Factor)
 - DO NOT multiply Schedule Requirement by Shrinkage Factor
 - You will then be understaffed
 - 54 times 1.30% = 70 BUT you really need 54 divided by .70 = 77

Call Center Management Big 3

Client Service

- Service Level
- Average Speed of Answer
- First Call Resolution
- Abandon Rate
- Quality

Staff Management and Development

- Attendance
- Training
- Coaching
- Skills Improvement

Staff Productivity

- Average Handle Time including Talk and ACW
- Adherence
- Sales per call
- Quality

Comparison of the Big 3's

See any similarities ?

WFM BIG 3	CALL CTR MGMT BIG 3
<p>Forecasting</p> <ul style="list-style-type: none"> •Talk Time •ACW •Call volume •Service Level 	<p>Staff Productivity</p> <ul style="list-style-type: none"> •Talk Time •ACW <p>Client Service</p> <ul style="list-style-type: none"> •First call resolution •Service level
<p>Scheduling</p> <ul style="list-style-type: none"> •Absence •Training •Coaching •Unproductive time 	<p>Staff Productivity</p> <ul style="list-style-type: none"> •Adherence <p>Staff Development</p> <ul style="list-style-type: none"> •Coaching •Training
<p>Tracking</p> <ul style="list-style-type: none"> •Absence •Training •Coaching •Vacation •Offline activities •AHT 	<p>Staff Development</p> <ul style="list-style-type: none"> •Attendance •Skills Improvement <p>Staff Productivity</p> <ul style="list-style-type: none"> •Adherence •AHT

What is your business model and goals

Inbound

Outbound

Emails

Chat / Co – Browser

Service Goals

- Service Level
- Average Speed of Answer
- Revenue per call

Employee Impacts

Shift Bids

- Bid order
 - Seniority
 - Productivity
 - Combination
 - Team Rotation

Vacation Bids

- Annually
- Blocks versus individual days
- Changes
- Daily allotments
- Carryovers
- Blackouts

Sick Days

- Paid versus unpaid
- Benefit versus entitlement

Employee Impacts

Personal Days

- Book in advance
- Same day
- How can they be used ?

Payroll

- Hourly or salary
- Who submits ?

Hiring

- Full time versus Part time
- Status changes

Super Agents

- Various categories
- How do they bid or get assigned shifts
- Are they working at the right time for the business

Challenges for all !

Attendance

- Are the staff showing up as planned
- Real time attendance tracking and sharing of information
- Do you have reward / recognition programs to support attendance

Adherence

- Are they following the plan
- How do you manage “ getting stuck on a call “
- What is reasonable amount of time to be out of adherence
- Consider your average call length (5 min versus 20 minutes)
- Do you reward / recognition programs to support adherence

Time Control

- Call center staff are the most measured and scrutinized employees
- How do Sales and Marketing staff feel about tracking their time ?
- Are you measured so closely ?

Does One Agent Make a Difference ?

“What does it matter if I call in sick today. There are 100 other people here to answer calls.”

WFM Response

- It's your job
- You are getting paid
- We'll fire you

Call Center Manager Response

- You influence service levels
- You influence telecom costs
- You influence company profitability
- You make it a better place to work

The Power of One

STAFFING FOR SPEED

Workload Hours	Available Staff	ASA	Service Level
50	55	18	75%
50	54	28	66%
50	53	46	55%
50	52	84	40%
50	51	201	22%

750 calls with an AHT of 240 seconds. Goal is to answer with an ASA of 20 seconds

The Power of One

SHARING THE WORKLOAD

Workload Hours	Available Staff	ASA	Occupancy Rate
50	55	18	90%
50	54	28	92%
50	53	46	94%
50	52	84	96%
50	51	201	98%

750 calls with an AHT of 240 seconds. Goal is to answer with an ASA of 20 seconds

The Power of One

BOTTOM LINE IMPACT

Number of Calls	Available Staff	ASA	Extra Queue Time per Call	Total Extra Minutes	Additional Phone Costs
750	55	18			
750	54	28	10	125	\$ 6.25
750	53	46	28	350	\$ 17.50
750	52	84	66	825	\$ 41.25
750	51	201	183	2287	\$ 114.35

750 calls with an AHT of 240 seconds. Goal is to answer with an ASA of 20 seconds

WFM Tools

- Industry Software
 - Aspect, Witness, IEX, Genesis, Pipkins, Calabrio, etc
 - ICMI survey of 361 cc professionals , 51.9% had automated software

- Other Tools
 - Performance reporting 67%
 - Erlang Add ins 37%
 - Forecasting software 32%
 - Exception processing 18%
 - Simulation Software 12%
 - Spreadsheets 8%
 - Outsourcer 3%

- Industry Tools
 - Quikstaff by SWPP

Reference Sources

- The Call Center School
 - <http://thecallcenterschool.com>
 - Whitepapers on WFM processes , automation acquisition, etc
 - QuikStaff – downloadable software tool
 - “ The Power of One “ , The Call Center School, Penny Reynolds
 - “ Call Center Staffing “ , The Call Center School, Penny Reynolds
- The Society of Workforce Planning Professionals (SWPP)
 - <http://www.swpp.org>
 - Managing Director is Vicki Herrell
- Erlang UK
 - www.erlang.uk.co
 - Downloadable plug in for staffing calculator
 - Create your own spreadsheet
- ICMI.com
 - International Customer Management Institute
 - <http://www.incoming.com/WebModules/Products/SeminarDetail.aspx?ProductId=428>