

MANAGEMENT ROI



Getting the WFO Basics Right

By Tom Goodmanson, Calabrio

Keeping a few principles in mind will help you to leverage the full potential of WFO technology.

Workforce optimization (WFO) technology can significantly impact the productivity and skills of employees, help agents diffuse difficult customer situations and provide insights that can feed into a company's larger business strategy. With so many useful software applications within WFO, trying to figure out how to leverage every capability to its full potential can be daunting. The danger in trying to implement all of it is that a contact center may overlook the basics and lose sight of operating principles required for long-term success.

Even though the definition and potential of WFO is easy to understand, selecting and implementing the right combination of WFO tools seems overwhelming. Getting the WFO basics right is critical to your ability to leverage the suite's broader business potential down the road. It can be useful to examine why WFO is so important in the current marketplace, what the tools of the trade are, and how operating principles that go beyond the technology can help contact centers reap the full benefits of WFO.

Customer Satisfaction Is Possible in Today's Marketplace

It's not easy being a customer in today's economy. People are anxious about every facet of their financial lives—from their jobs to anxiety about an uncertain future. As a result, when customers have problems with a particular company's products or services, they may have little patience when dialing up the contact center.

Last September, *The Wall Street Journal* published an article citing research which found that: "70% of customers who have problems with a product or service are in a rage by the time they talk with customer service workers; 24% yell, 8% threaten to sue, and 5% start cursing." In the article, Mary Jo Bitner, an Arizona State University professor and researcher on the survey, commented that the rage is probably even

higher now because financial issues are causing people to be "more on edge, critical and less tolerant."

So, what's the impact on contact centers? It means that the window of opportunity for resolving a customer's issue, and keeping them satisfied and loyal to a company's brand, products and services, is increasingly shrinking.

Tools of the Trade

The elements for getting the basics right include an understanding of the contact center's audiences and the available WFO tools for meeting their needs. A contact center is run by its people and processes, and each person involved with the contact center has a different set of needs and priorities. For instance, the customers expect the company to respect their time, handle their questions, address their problems and treat them respectfully. Agents (especially the new generation of workers) seek ongoing feedback on their performance, and they expect to be equipped with the latest technology to properly do their job (see our blog post on the subject at <http://calabrio.wordpress.com/>). Supervisors want the contact center to run smoothly, and they want to be able to track performance and to intervene on a call, if needed.

Based on the larger business goals, contact centers need to find the right balance of WFO tools to appeal to their audiences' needs. The tools include:

- **Workforce management** to forecast and schedule agent staffing needs
- **Quality management** to help supervisors identify training and coaching needs to improve agent performance

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- **Performance management** to help align contact center activities with enterprise goals, as well as to provide scorecards and dashboards to monitor the contact center's performance
- **Speech analytics** to capture and analyze customer calls to identify the underlying reasons for the contact

Companies are increasingly recognizing that the variety of available WFO tools can positively impact their business. According to DMG Consulting's *WFO Mid-Year Market Share Report*, "Contact center WFO revenue increased by 10.5%, growing from \$427.7 million in the first half of 2009 to \$522.1 million in the same period in 2010."

Identify Goals Before Implementation

We've briefly reviewed what typically makes up a WFO suite, and we know which applications can help contact centers save time and money, increase ROI and drive revenue. But to effectively identify and leverage the right WFO applications, centers must take into account broader business considerations and remember a few key operating principles.

It begins with setting clear goals that align with the business strategy before implementing WFO. Setting goals is tied into good reporting and performance management. Start with the overall business goals and then map them to clear, measurable KPIs. These goals should ensure that customers and employees are happy and satisfied, and they should help to maximize revenues and decrease costs. Once those goals have been set, it will help determine which WFO tools can achieve the desired results.

Quality Communication and Data Drive Quality Management

While measuring performance against KPIs will drive progress toward business goals and highlight any issues, the system breaks down if such measurement is not strongly communicated to contact center agents. Employees must understand what is expected of them, know the KPIs that they are being measured against and how they tie into business success.

Once agents are clear on expectations, managers must be diligent in providing feedback and rewarding results. The process of sharing progress can be automated through individual and team performance dashboards where agents can see how they are performing against goals. Quality evaluations can be used as a tool to rate what they did well, not just what they need to do better. This can help provide valuable context and supervisor insight that is not possible if the quality management process is limited to a strict scorecard approach.

When developing a proper evaluation approach, be sure that the standards lead to verifiable results, such as increasing customer satisfaction. For example, a standard on how often an agent uses the customer's name during a call may sound noble, but if you cannot validate that it makes a difference when resolving a customer's issue, it may not be worth measuring.

When it comes to effective evaluation and coaching, speech analytics is one of those applications that, in the past, was considered too out of reach for practical use among your average contact centers. Not anymore. According to DMG Consulting, speech analytics implementations grew 39% between 2008 and 2009.

With speech analytics, the ability to pick out key words and phrases makes it a quality data source

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Workforce optimization technology includes applications such as call recording, quality management (QM), workforce management (WFM), performance management, live voice and screen monitoring, speech analytics, reporting, dashboards and alerts.

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for coaching purposes. It allows managers to focus on a particular area for measurement when random call sampling is not the best approach. For example, managers who want to gauge how a particular product issue is being handled by their agents can use speech analytics to zero in on key terms associated with the issue. That said, it's important that organizations be willing to dedicate the resources and time to setting up speech analytics properly to avoid it turning into shelf ware.

Building a Simple Approach to Managing the Workforce

Knowing how best to manage the time and resources of contact center personnel is the foundation for success in critical areas like customer satisfaction, agent retention and business growth. If a contact center doesn't have a handle on how it should be allocating agents' time, it subsequently hurts other areas, such as quality management, performance management and cost management.


As part of WFO, effective workforce management can cover the basics without turning into a chaotic implementation exercise that never seems to end. Through a step-by-step process, contact centers can create a solid forecast of anticipated call volume, assign the appropriate level of agent coverage and help ensure that agents are sticking to the schedule. It starts with reviewing historical call data to see where there are factors such as peak call times or seasonal changes. A contact center then decides the service level metrics it wishes to achieve.

Done correctly, the management process gets more effective as workload data is continually fed into the system, day after day, step by step. The contact center becomes increasingly more accurate

in determining the appropriate balance of staffing to meet call demand through this continuous historical trend analysis applied to future schedules.

An important guiding principle for the successful use of the technology is to empower the agents in the process. For example, let them use the application to control their time-off requests, view their schedules and ask for shift changes. If agents are invested in the process, then the center is accomplishing more than just running a technology application to manage its business; it's building the support of the key ingredient of any successful company—its employees.

Keeping It Simple with WFO

Though it's easy to get bogged down in endless emerging features and technologies, WFO does not have to be overly complicated. It's the basics that are critical to success. With measurable goals, intuitive tools and a clear picture of progress, the upside is clear. Management will have a solid understanding of what's happening in the contact center. Customers will have more positive experiences when connecting with agents since they will experience shorter wait times and higher first-call resolution. Agents will take more responsibility for their own schedules and behaviors because of the information that is easily accessible and feedback is ongoing and consistent. 

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Online Resource

This issue is available online at: [February 2011, Contact Center Pipeline](http://www.contactcenterpipeline.com/t-CCP201102.aspx)

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