

WORKFORCE PLANNING & OPTIMISATION

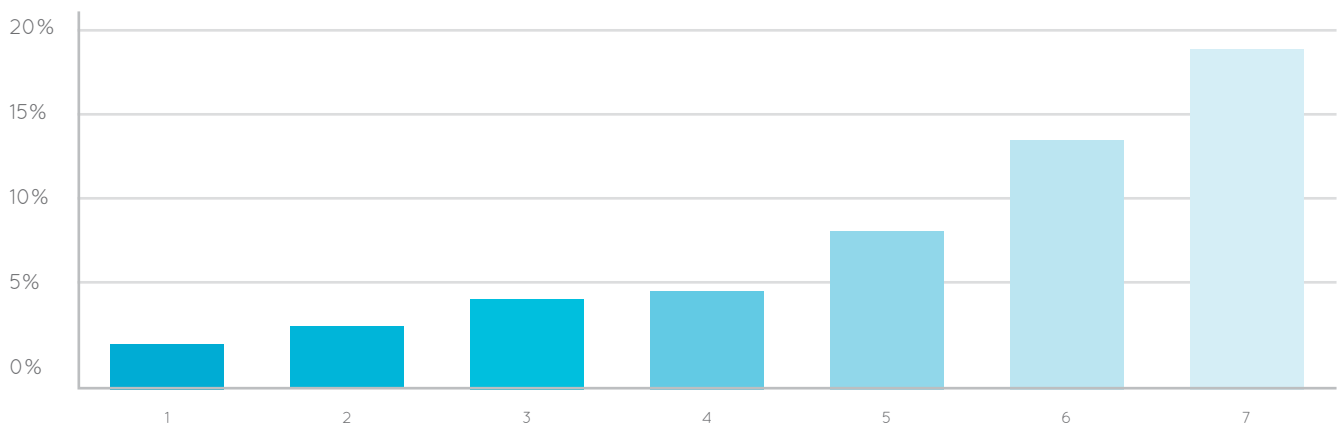
BEST PRACTICE REPORT



WORKFORCE PLANNING & OPTIMISATION

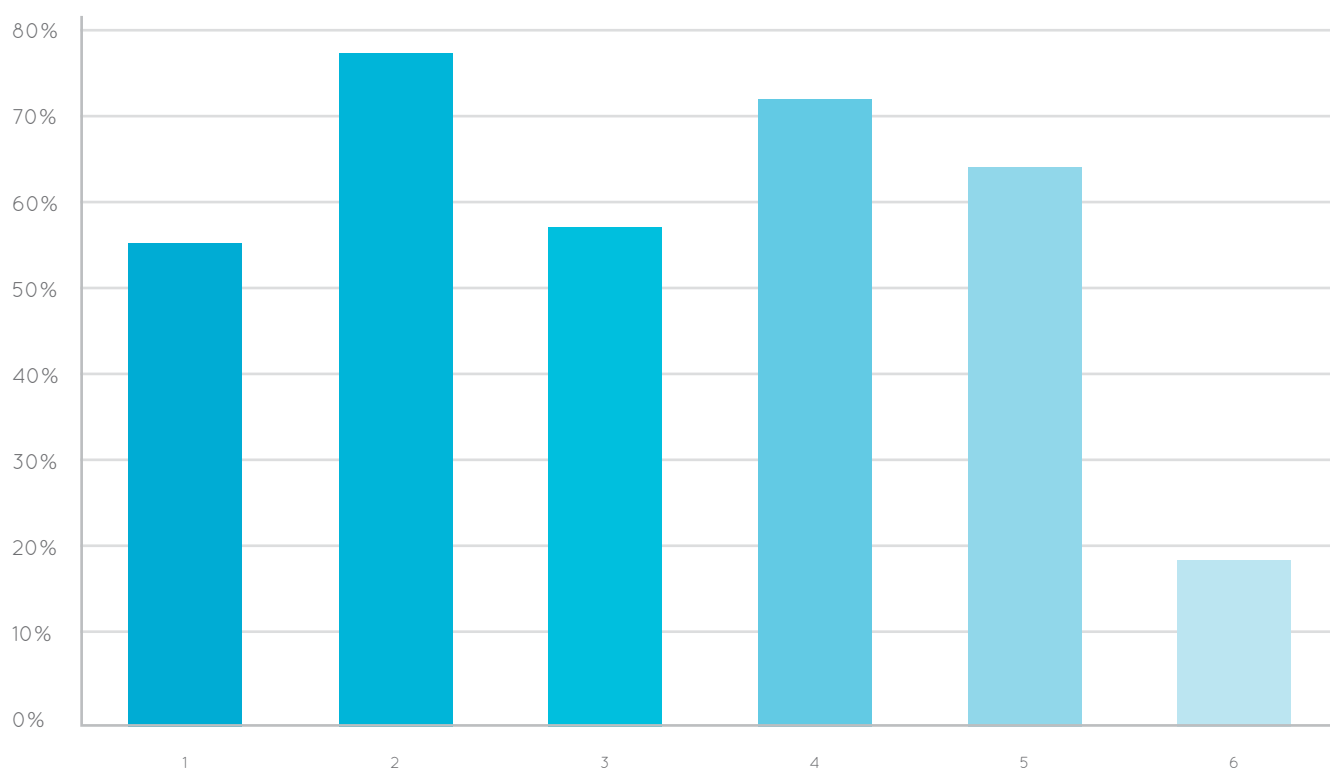
HOW MANY PEOPLE WORK IN THE WORKFORCE MANAGEMENT TEAM INCLUDING YOURSELF?

SIZE OF CONTACT CENTRE	#	AVERAGE NUMBER OF PEOPLE IN WORKFORCE MANAGEMENT TEAM
0 - 50	1	1.3
51 - 100	2	2.3
101 - 200	3	4.4
201 - 300	4	4.8
301 - 500	5	7.2
501 - 1,000	6	12.7
1,001 +	7	18.5



DO YOU HAVE ANY OF THE FOLLOWING WORKFORCE MANAGEMENT SPECIFIC ROLES IN YOUR CONTACT CENTRE?

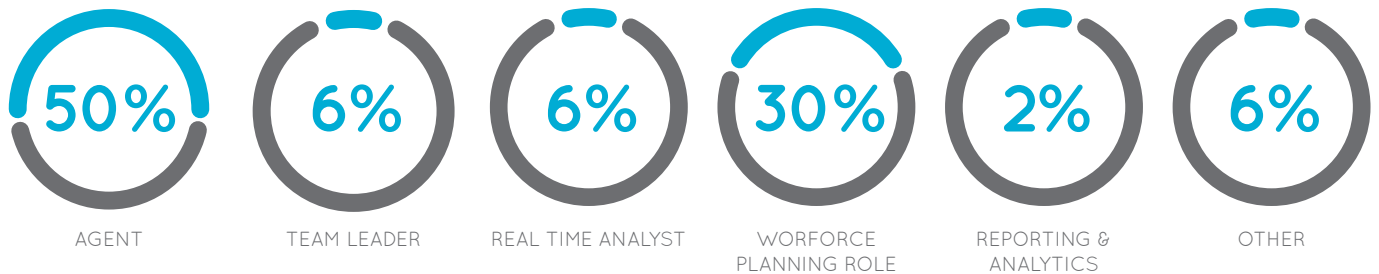
ANSWER CHOICES	#	RESPONSES
Workforce Planning Lead (or similar)	1	54%
Workforce Manager (or similar)	2	77%
Forecaster	3	56%
Scheduler	4	71%
Real Time Analyst	5	63%
Other	6	19%



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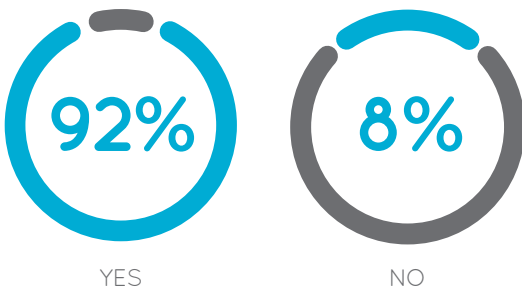
WHERE DID YOU START IN THE CONTACT CENTRE?

ANSWER CHOICES	RESPONSES
Agent	50%
Team Leader	6%
Real Time Analyst	6%
Workforce Planning role	30%
Reporting and Analytics	2%
Other	6%



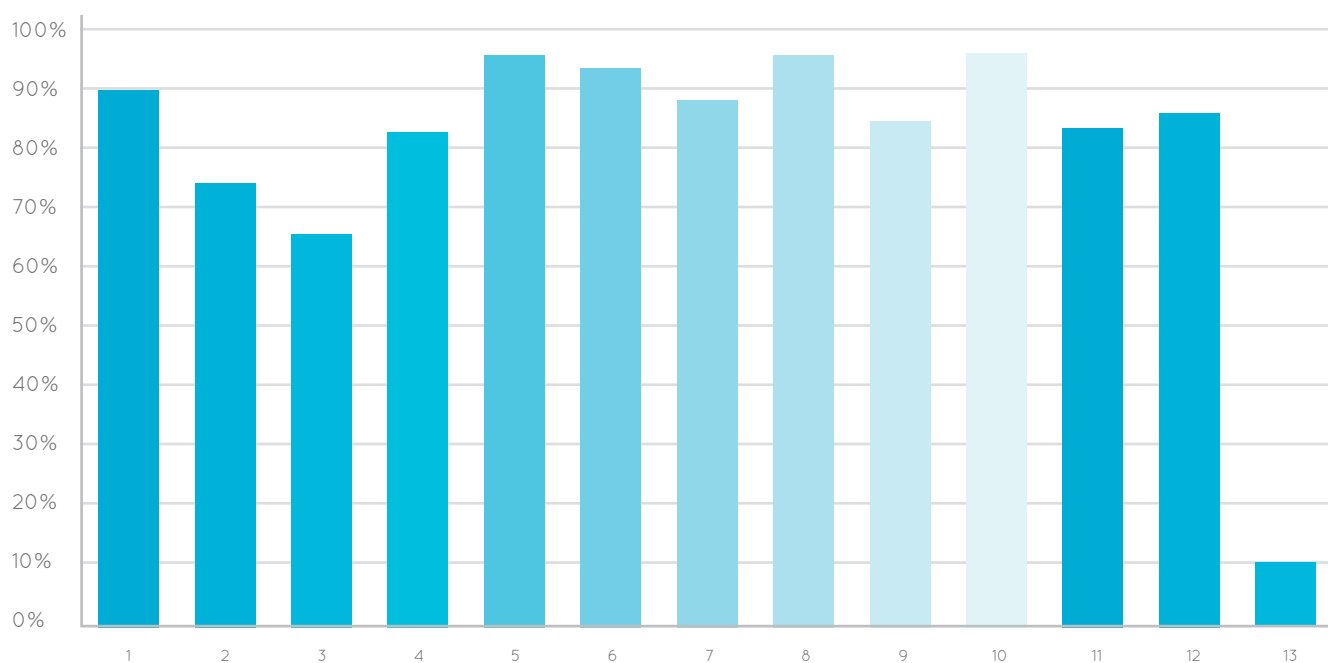
WOULD YOU SAY YOU HAVE A DEDICATED WFM PROCESS IN PLACE IN YOUR ORGANISATION?

ANSWER CHOICES	RESPONSES
Yes	92%
No	8%



WHAT ARE THE KEY COMPONENTS OF YOUR WORKFORCE MANAGEMENT PROCESS? (SELECT ALL THAT APPLY)

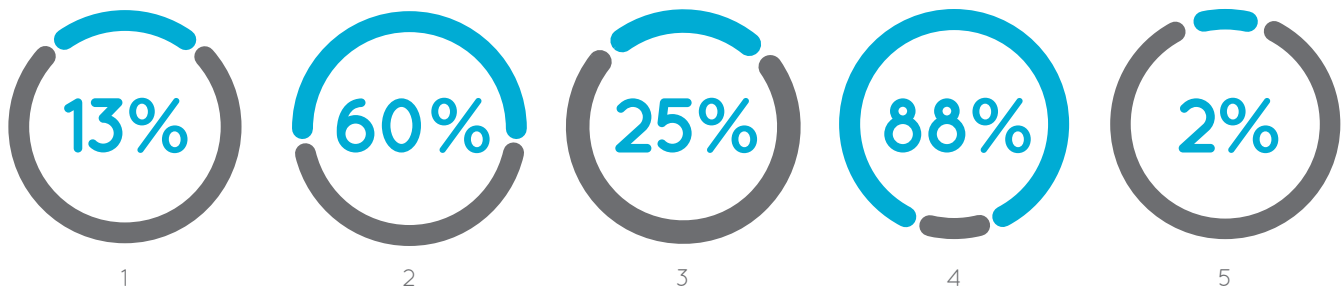
ANSWER CHOICES	#	RESPONSES
At least one person dedicated to workforce planning	1	90%
At least one real time analyst	2	73%
Induction training for new hires on the importance of adherence	3	65%
Providing recruitment recommendations on the type of shift required	4	81%
Forecasting for short term – up to 6 weeks	5	94%
Forecasting for mid term	6	92%
Forecasting for long term (12 months +)	7	88%
Building agent schedules	8	94%
Making recommendations for new schedules	9	83%
Annual Leave Planning	10	94%
Real Time Adherence Management	11	83%
Reporting and analytics	12	85%
Other	13	10%



WORKFORCE PLANNING & OPTIMISATION

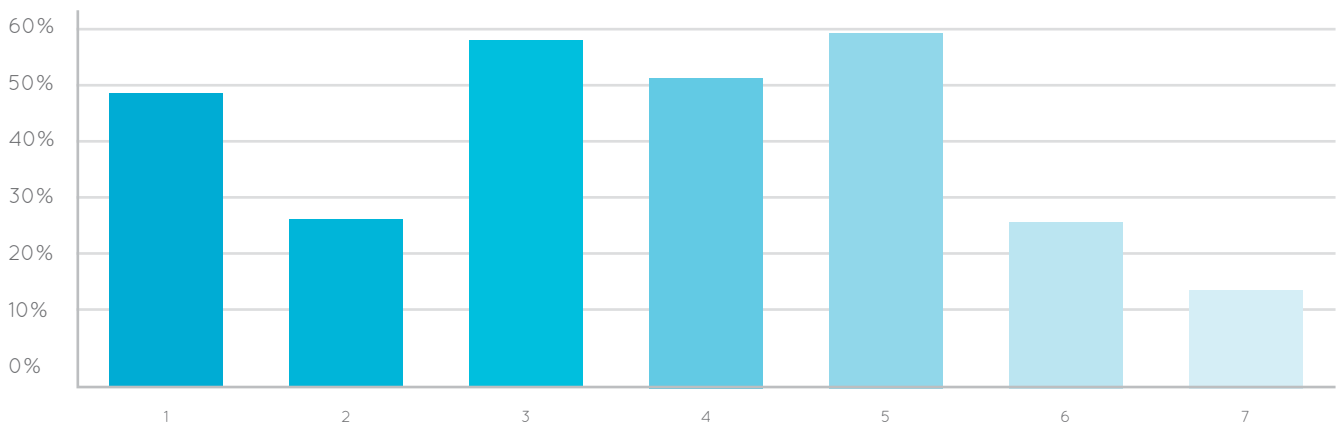
WHAT TRAINING IS PROVIDED TO A NEW PERSON HIRED FOR THE WFM TEAM IN YOUR COMPANY? (SELECT ALL THAT APPLY)

ANSWER CHOICES	#	RESPONSES
Third Party Training on best practice WFM principles	1	13%
In house training on best practice WFM principles	2	60%
Vendor training on the WFM system	3	25%
In-house or on the job training on the WFM system	4	88%
Other	5	2%



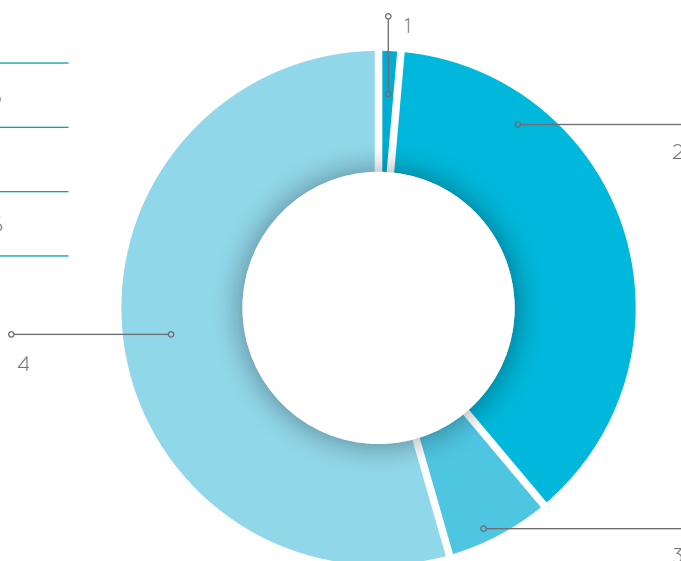
ARE WFM TEAM MEMBERS OFFERED ONGOING SKILLS TRAINING? (SELECT ALL THAT APPLY)

ANSWER CHOICES	#	RESPONSES
Additional vendor training on topics as requested	1	49%
Third Party Training on WFM processes and best practices	2	25%
Internal training on WFM	3	59%
Leadership training	4	51%
Internal training on other topics	5	59%
External training on other topics	6	25%
Other	7	12%



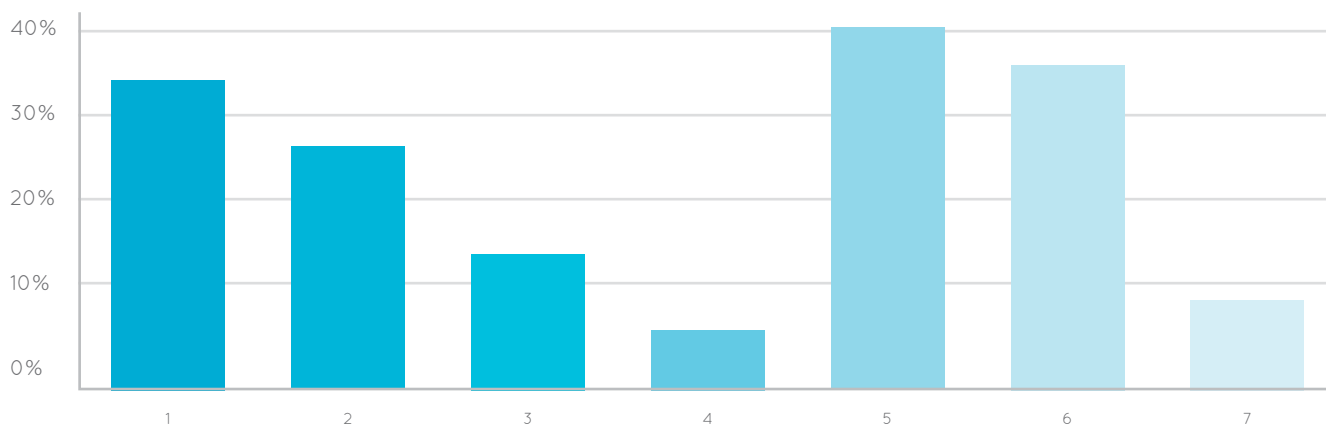
WHAT ARE THE KEY COMPONENTS OF YOUR WORKFORCE MANAGEMENT PROCESS? (SELECT ALL THAT APPLY)

ANSWER CHOICES	#	RESPONSES
Third Party Training on best practice WFM principles for Team Leaders	1	2%
In house training on best practice WFM principles	2	57%
Vendor training on how to use the WFM tool as a team leader	3	10%
In-house or on the job training on how to use the WFM system as a team leader	4	84%
Other	5	0%



WHICH VENDOR SYSTEM DO YOU USE FOR YOUR WORKFORCE MANAGEMENT?

ANSWER CHOICES	#	RESPONSES
Aspect/ Alvaria	1	33%
Verint	2	27%
Nice	3	12%
Calabrio	4	4%
Genesys	5	40%
Excel	6	35%
Other	7	8%



WORKFORCE PLANNING & OPTIMISATION

IS YOUR SYSTEM A CLOUD BASED SYSTEM OR ON PREMISE?

ANSWER CHOICES	RESPONSES
Cloud based	58%
On premise	42%



CLOUD BASED



ON PREMISE



THESE NEXT 4 QUESTIONS ARE ONLY ANSWERED BY PEOPLE WHO DO NOT CURRENTLY HAVE A WORKFORCE MANAGEMENT SYSTEM

IF YOU DO NOT HAVE A WORKFORCE MANAGEMENT SYSTEM, ARE YOU LOOKING TO INVEST IN ONE?

ANSWER CHOICES	RESPONSES
Yes	67%
No	33%



YES



NO



ONLY ANSWERED BY PEOPLE WHO DO NOT CURRENTLY HAVE A WORKFORCE MANAGEMENT SYSTEM

WHAT IS YOUR TIMEFRAME FOR INVESTING IN A WORKFORCE MANAGEMENT SYSTEM?

ANSWER CHOICES	RESPONSES
Within the next year	43%
> 12 months	57%



YES



NO



ONLY ANSWERED BY PEOPLE WHO DO NOT CURRENTLY HAVE A WORKFORCE MANAGEMENT SYSTEM

WHAT IS THE MAIN BARRIER?

ANSWER CHOICES	#	RESPONSES
Cost	1	33%
Senior executives don't see the benefit in the investment	2	0%
Other initiatives have greater priority	3	0%
Size of the contact centre	4	33%
Other	5	33%



ONLY ANSWERED BY PEOPLE WHO DO NOT CURRENTLY HAVE A WORKFORCE MANAGEMENT SYSTEM

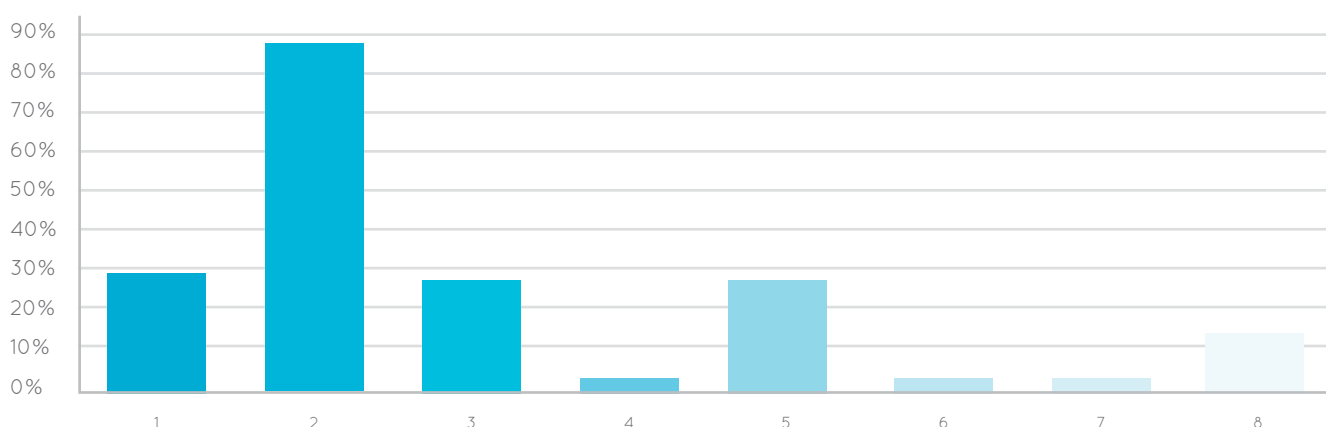


WHAT WERE THE KEY DRIVERS IN DECIDING TO INVEST IN SUCH A WORKFORCE MANAGEMENT SYSTEM? (SELECT UP TO 2).

ANSWER CHOICES	#	RESPONSES
Price	1	28%
Features and Functionality	2	88%
Support availability	3	26%
Modern look and feel	4	2%
Scalability	5	26%
References / market opinion about the software	6	2%
Supplier reputation	7	2%
Other	8	12%



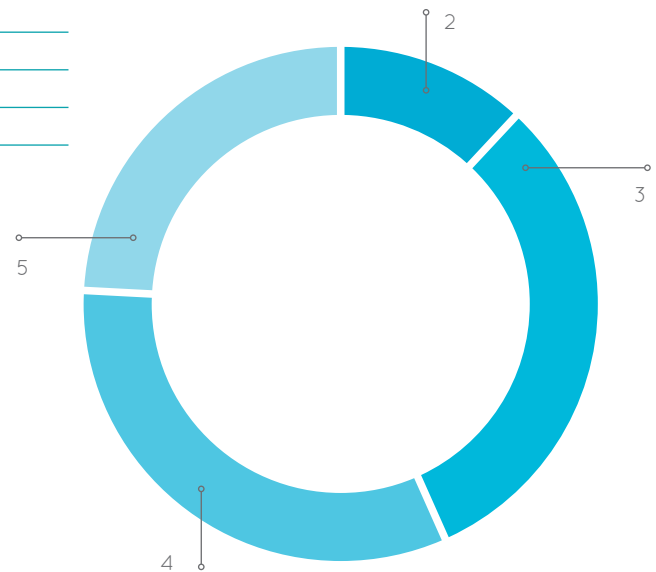
ONLY ANSWERED BY PEOPLE WHO DO NOT CURRENTLY HAVE A WORKFORCE MANAGEMENT SYSTEM



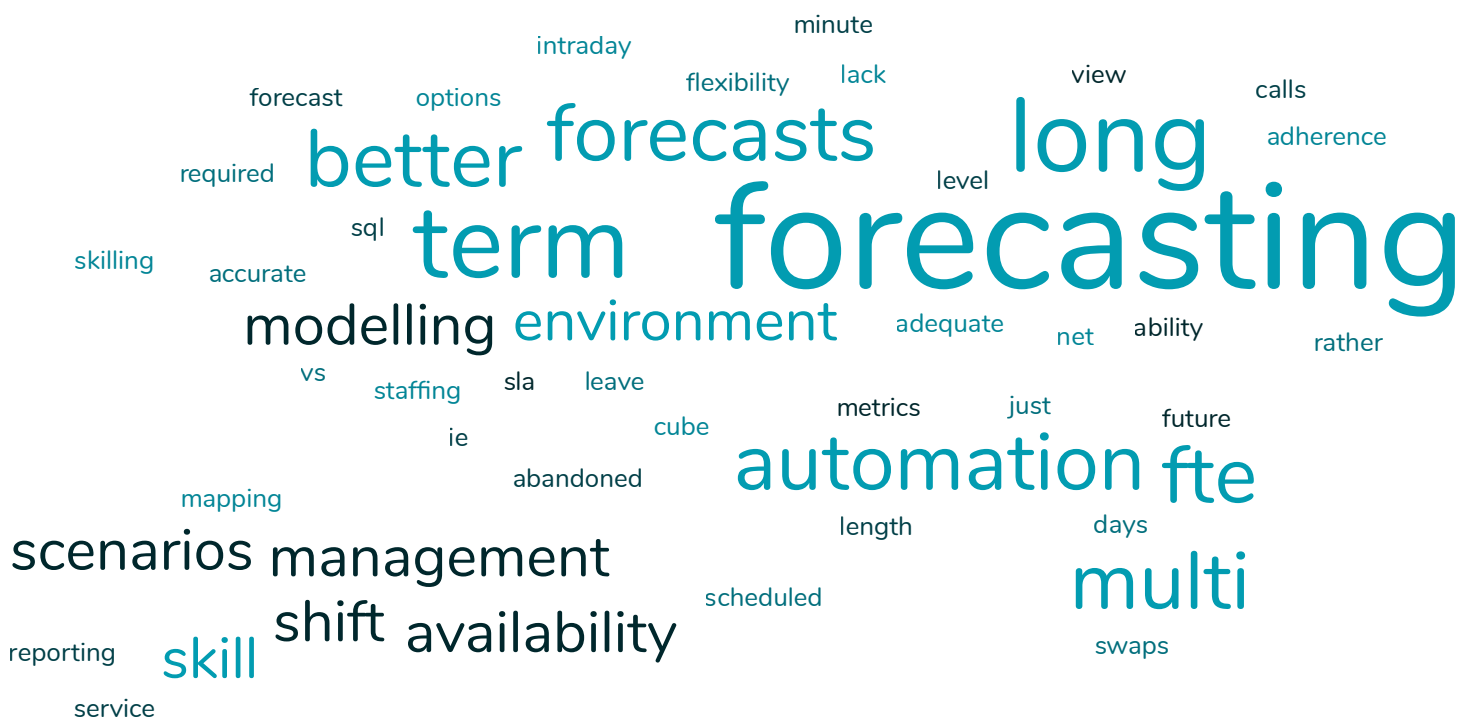
WORKFORCE PLANNING & OPTIMISATION

HOW WOULD YOU RATE YOUR WFM TOOL?

ANSWER CHOICES	#	RESPONSES
Not sure	1	0%
Poor	2	12%
Average	3	37%
Good	4	33%
Excellent	5	19%
Other	6	0%



ARE THERE SPECIFIC FEATURES YOU WOULD LIKE TO SEE IN YOUR WORKFORCE MANAGEMENT TOOL THAT AREN'T THERE?



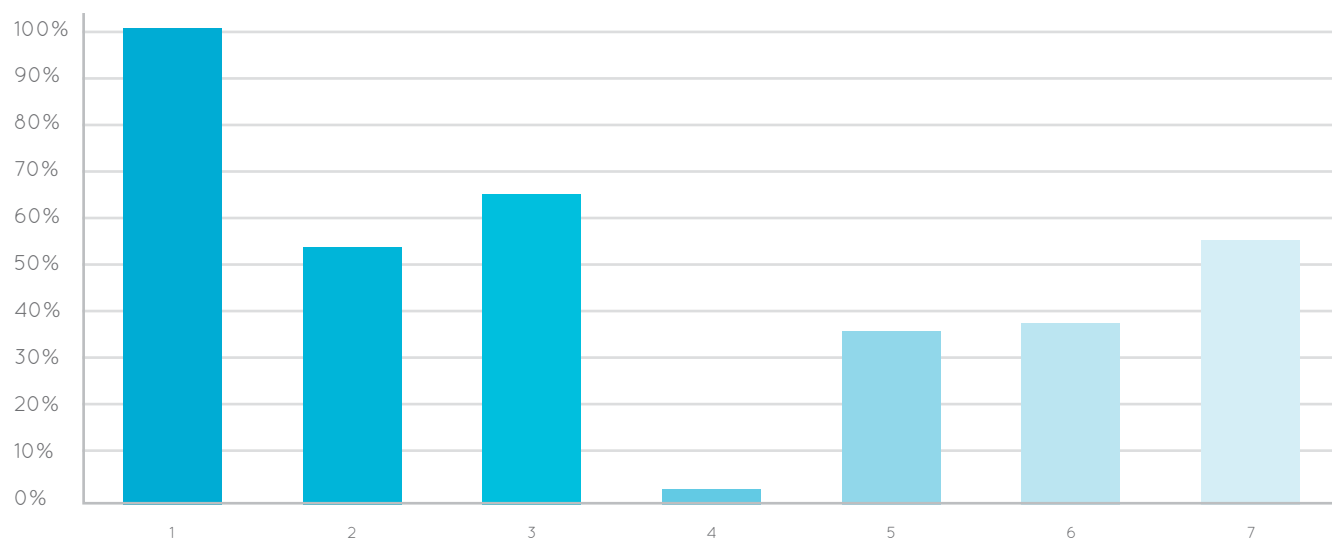
HOW DO YOU CREATE YOUR FORECASTS

ANSWER CHOICES	RESPONSES
Excel	46%
Workforce Management System	48%
Other	6%



WHAT TYPE OF WORK DO YOU FORECAST AND PLAN FOR IN YOUR ORGANISATION?

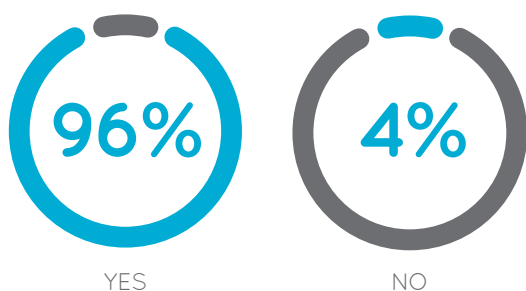
ANSWER CHOICES	#	RESPONSES
Inbound	1	100%
Outbound	2	52%
Email	3	63%
Fax	4	2%
Social	5	37%
Chat	6	54%
Back Office Tasks	7	50%



WORKFORCE PLANNING & OPTIMISATION

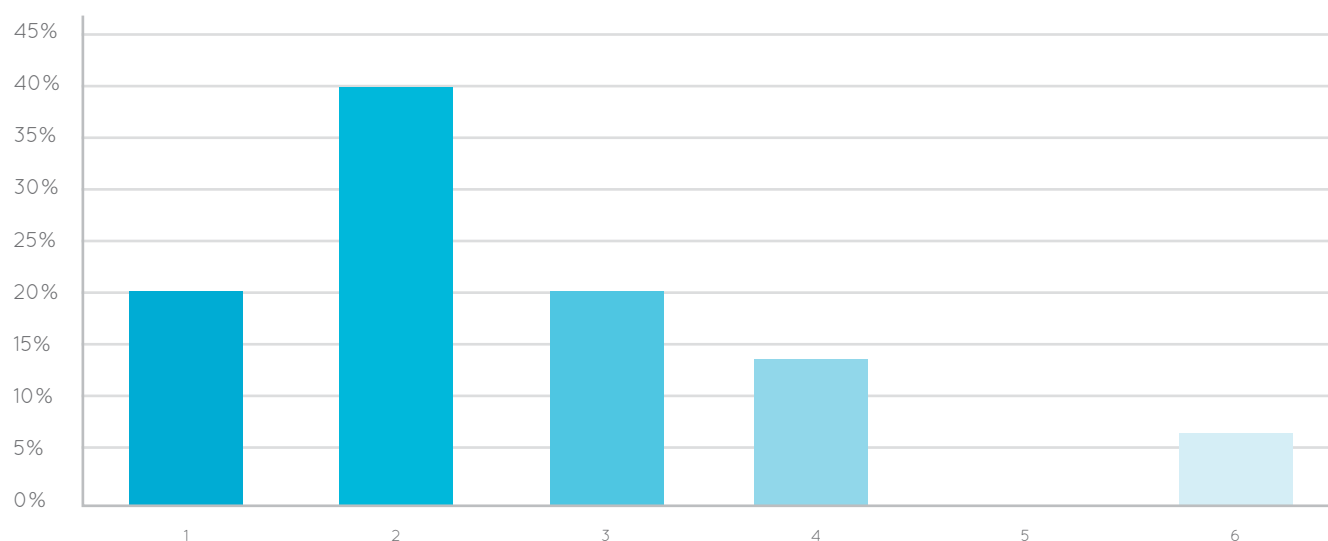
DO YOU MEASURE FORECAST ACCURACY?

ANSWER CHOICES	RESPONSES
Yes	96%
No	4%



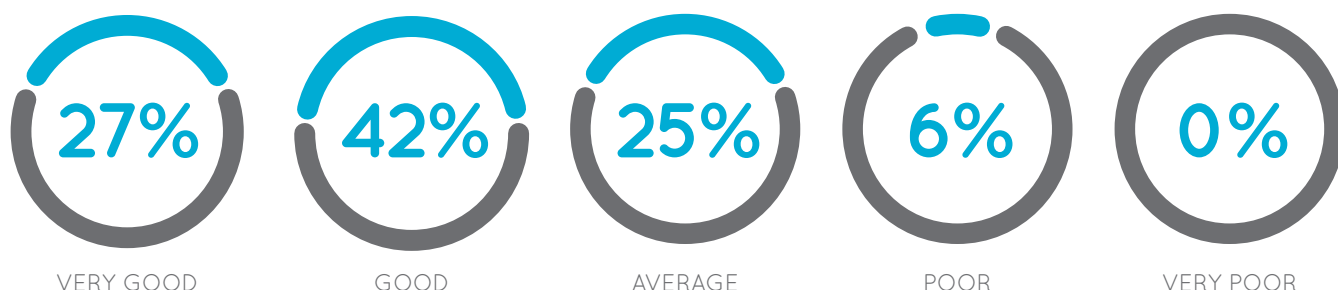
TO WHAT LEVEL DO YOU MEASURE FORECAST ACCURACY?

ANSWER CHOICES	#	RESPONSES
Interval (15 or 30 minute)	1	20%
Daily	2	40%
Weekly	3	20%
Monthly	4	14%
We do not measure forecast accuracy	5	0%
Other	6	6%



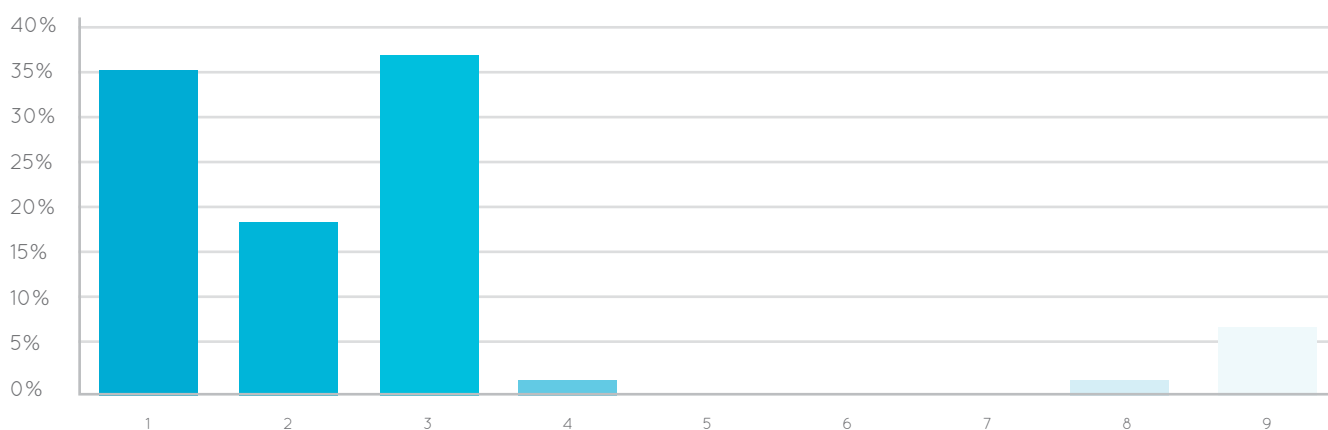
OVERALL, HOW WOULD YOU RATE THE PERFORMANCE OF YOUR FORECASTING PROCESS?

ANSWER CHOICES	RESPONSES
Very good	27%
Good	42%
Average	25%
Poor	6%
Very poor	0%



HOW OFTEN ARE NEW SCHEDULES CREATED IN YOUR CENTRE?

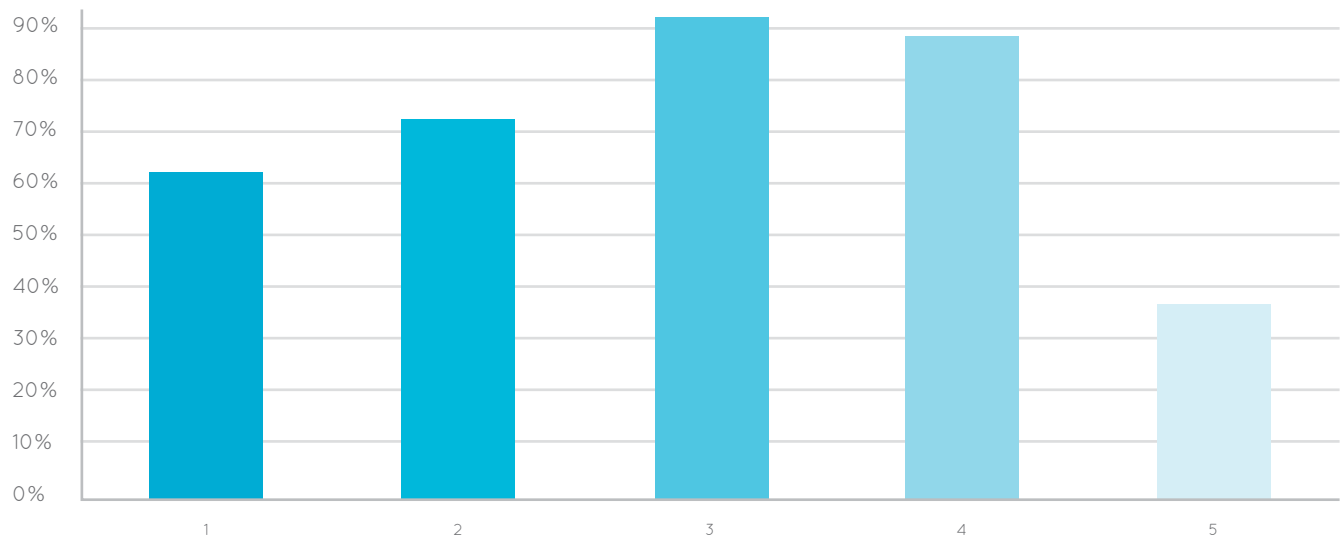
ANSWER CHOICES	#	RESPONSES
Weekly	1	35%
Fortnightly	2	18%
Monthly	3	37%
Every 2 months	4	2%
Every 3 months	5	0%
Every 6 months	6	0%
Annually	7	0%
Not sure	8	2%
Other	9	6%



WORKFORCE PLANNING & OPTIMISATION

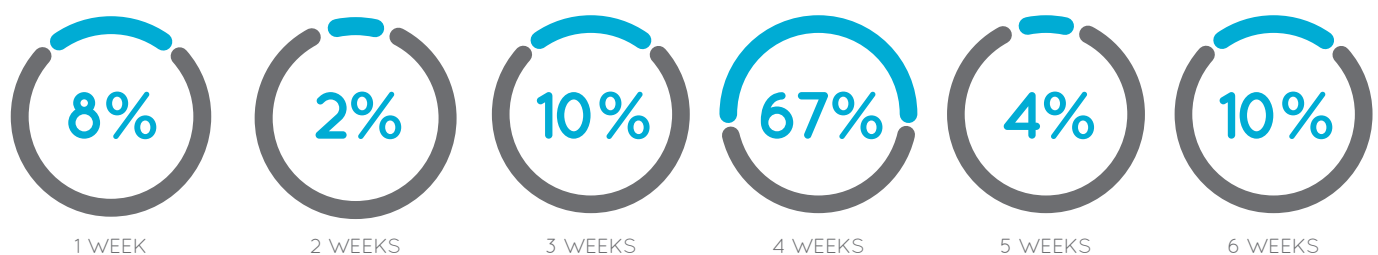
GENERALLY WHAT TYPES OF ROSTER/SCHEDULES ARE USED IN YOUR CENTRE(S)?:

ANSWER CHOICES	#	RESPONSES
Fully flexible (agents have a lot of control over the shifts they work)	1	62%
Preference Based	2	70%
Fixed	3	92%
Rotating	4	89%
Other	5	38%



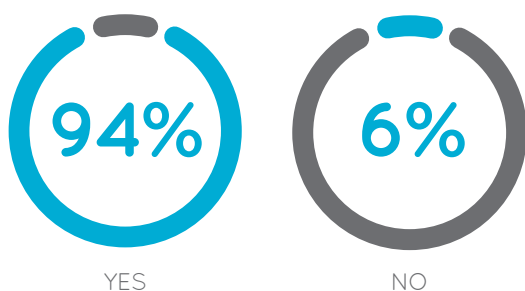
HOW FAR IN ADVANCE ARE SCHEDULES PROVIDED TO AGENTS?

ANSWER CHOICES	RESPONSES
One week	8%
Two weeks	2%
Three weeks	10%
Four weeks	67%
Five weeks	4%
Six weeks	10%



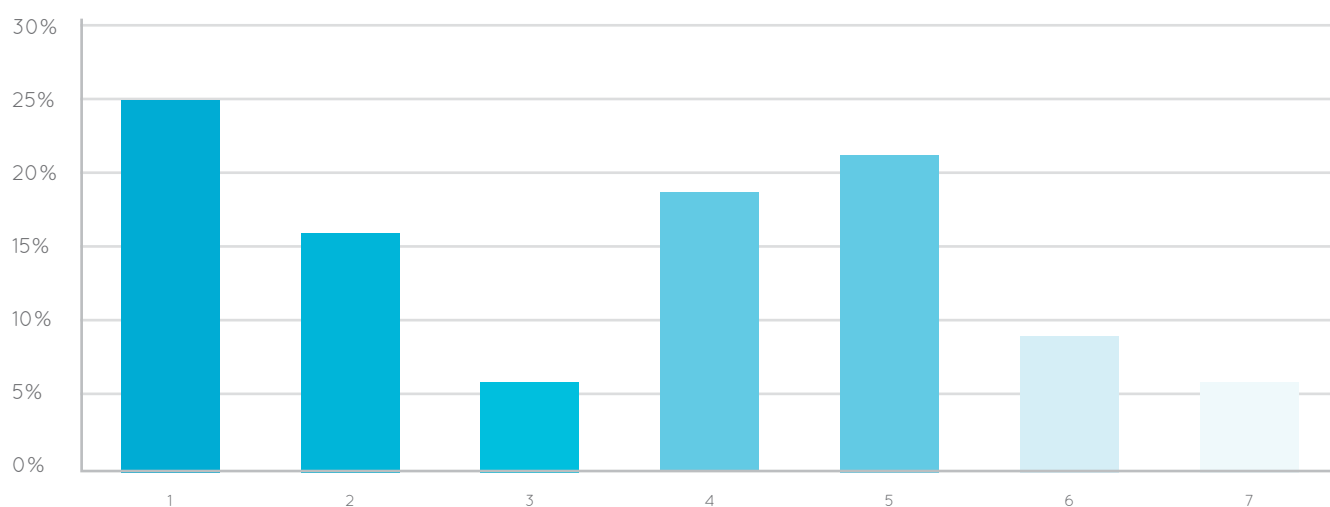
ARE CHANGES TO SCHEDULES CAPTURED AND UPDATED AS QUICKLY AS POSSIBLE?

ANSWER CHOICES	RESPONSES
Yes	94%
No	6%



WHAT IS THE AVERAGE DELAY IN UPDATING SCHEDULES?

ANSWER CHOICES	#	RESPONSES
Almost real time	1	25%
1 hour	2	16%
2 hours	3	6%
3 hours	4	18%
The next day	5	22%
Not sure	6	8%
Other	7	6%



WORKFORCE PLANNING & OPTIMISATION

IS THERE A CUT OFF TIME FOR TEAM LEADERS/ REAL TIME ANALYSTS TO UPDATE CHANGES IN SCHEDULES?

ANSWER CHOICES	RESPONSES
No	57%
Yes – How long?	43%



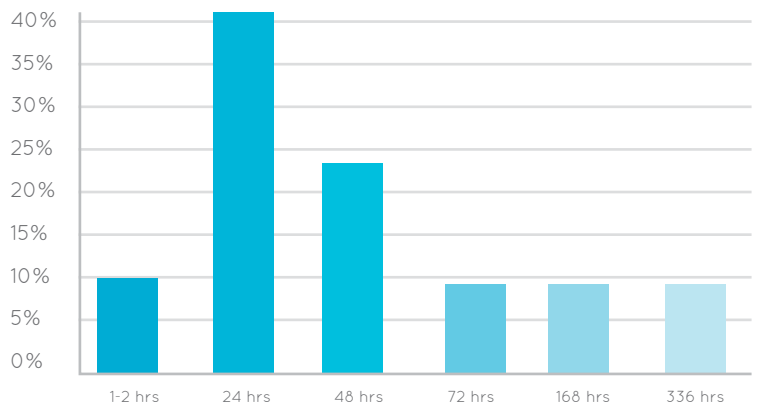
NO



YES

WHAT IS THE CUT OFF TIME?

HOURS:	RESPONSES:
1-2 hours	9%
24 hours	41%
48 hours	23%
72 hours	9%
168 hours	9%
336 hours	9%



WHAT IS THE CUT OFF TIME FOR TEAM LEADERS/REAL TIME ANALYSTS TO UPDATE CHANGES IN SCHEDULES?

ANSWER CHOICES	#	RESPONSES
Under 1 hour	1	5%
1-4 hours	2	9%
Half a day	3	9%
1 day	4	41%
2-3 days	5	18%
4-7 days	6	9%
1-2 weeks	7	5%



UNDER 1 HR



1-4 HRS



HALF A DAY



1 DAY



2-3 DAYS



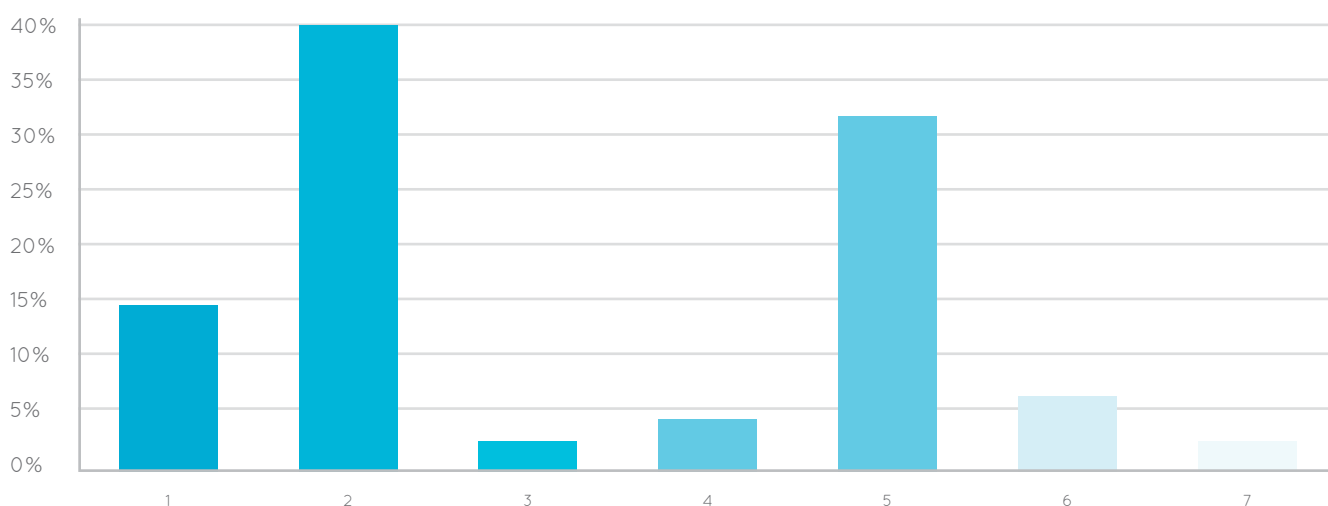
4-7 DAYS



1-2 WEEKS

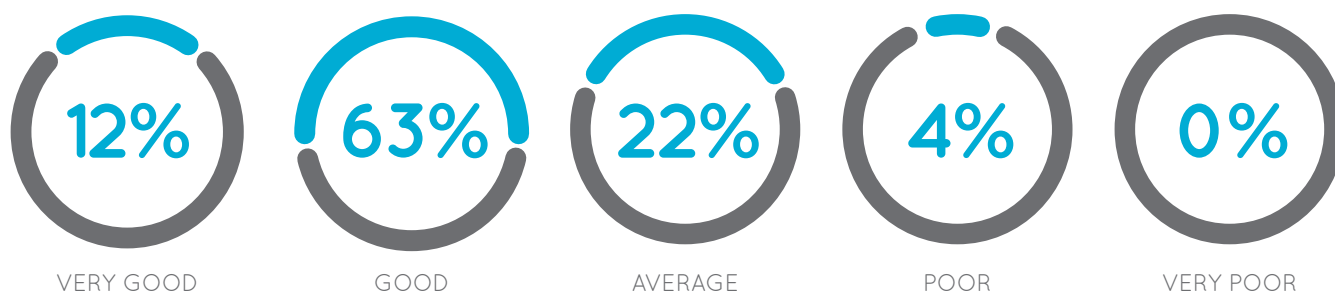
HOW DO YOU MEASURE SCHEDULING SUCCESS?

ANSWER CHOICES	#	RESPONSES
Occupancy	1	14%
Schedule Efficiency	2	40%
Number of changes made after publishing schedules	3	2%
Agent engagement	4	4%
We do not measure schedule success	5	32%
Abandonment	6	6%
Other	7	2%



HOW EFFECTIVE WOULD YOU RATE THE SCHEDULING PROCESS?

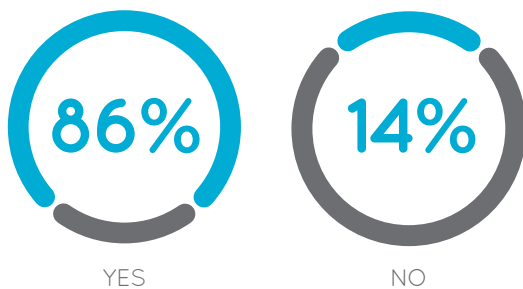
ANSWER CHOICES	RESPONSES
Very good	12%
Good	63%
Average	22%
Poor	4%
Very poor	0%



WORKFORCE PLANNING & OPTIMISATION

IS SCHEDULE ADHERENCE A PERFORMANCE TARGET / INDICATOR FOR AGENTS?

ANSWER CHOICES	RESPONSES
Yes	86%
No	14%



WHAT IS THE ADHERENCE TO SCHEDULE TARGET FOR AGENTS?

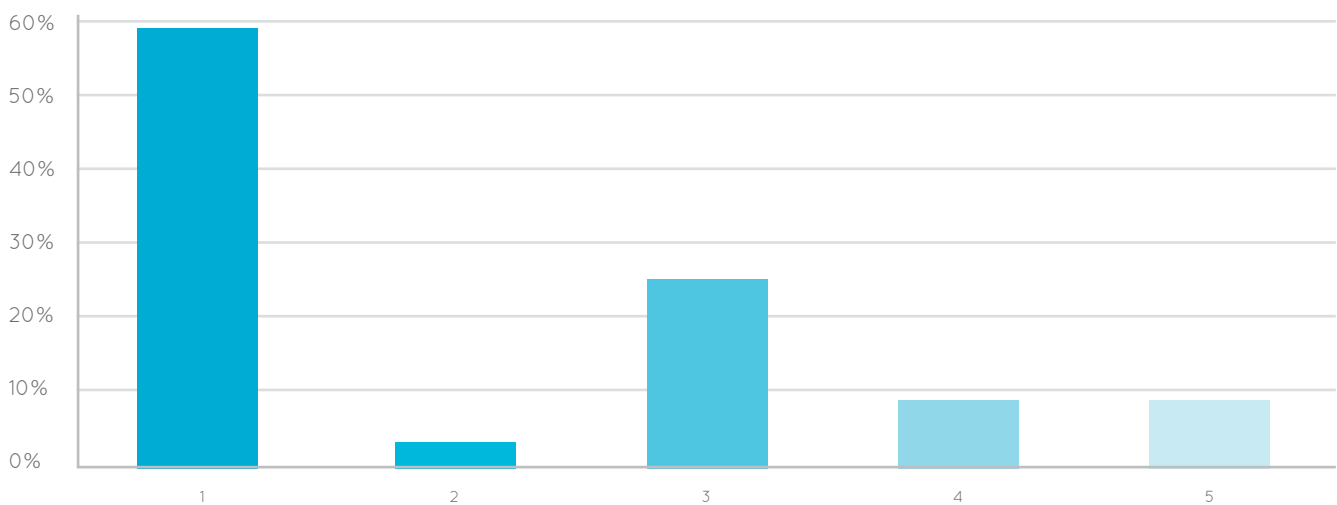


34% of contact centres have an adherence to schedule target of 94% or higher.

14% of contact centres have a target of 85% or lower.

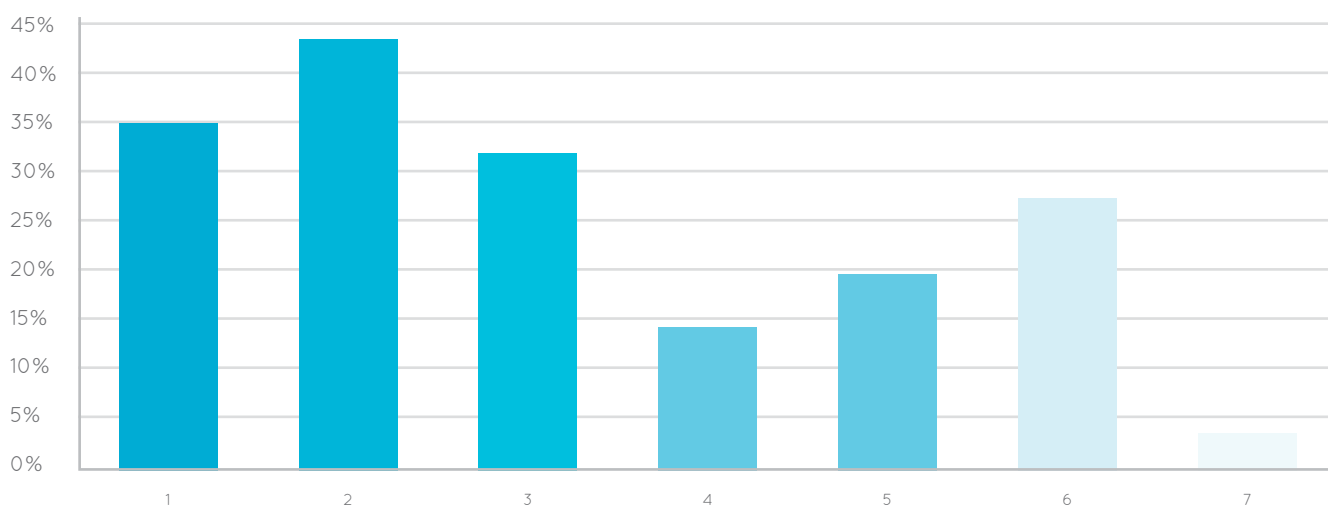
HOW DO YOU MEASURE SCHEDULING SUCCESS?

ANSWER CHOICES	#	RESPONSES
Service Level only	1	59%
Average delay only	2	2%
Both	3	24%
Abandonment	4	8%
Neither	5	8%



ARE YOU USING ANY OF THE FOLLOWING TECHNOLOGIES TO HELP IMPROVE AGENT ENGAGEMENT? SELECT ALL THAT APPLY.

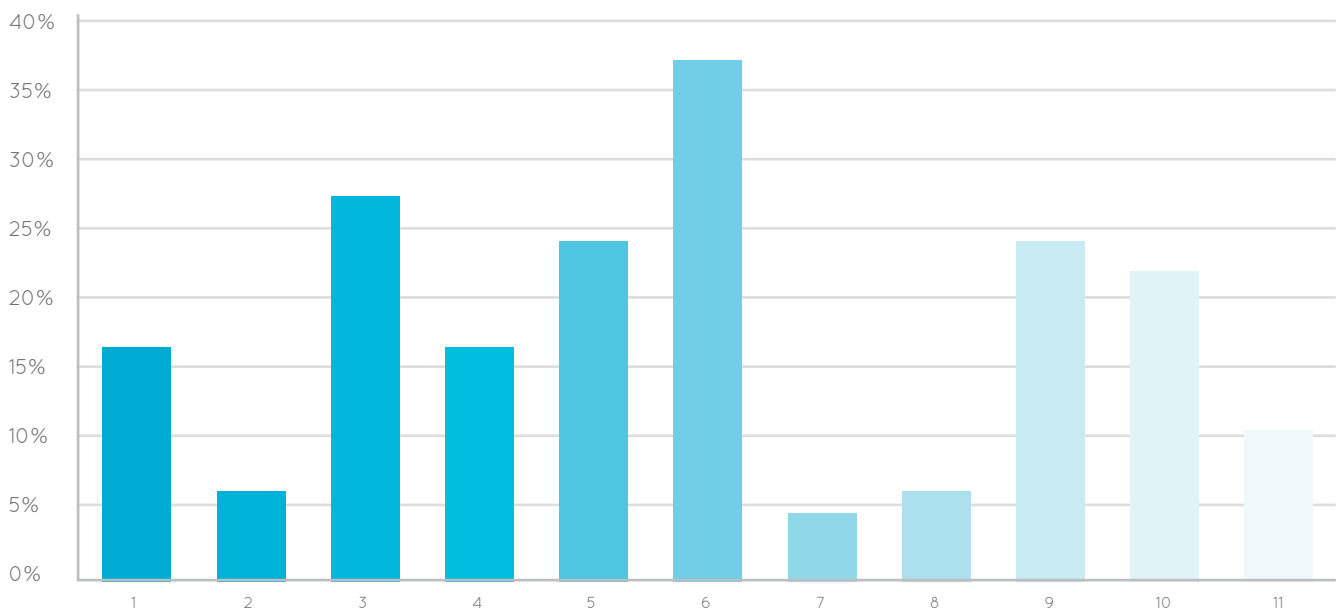
ANSWER CHOICES	#	RESPONSES
Technology that will offer more flexible schedules.	1	35%
Workforce Management mobile app so staff can view their schedules and apply for leave etc.	2	43%
Payroll integration so staff can apply for leave through your workforce management system	3	32%
Gamification of learning and development to improve performance	4	14%
Automating Real Time Management of schedules in line with changes in demand	5	19%
Automating changes in queues based on demand	6	27%
Automating agent learning and development based on demand and other prescheduled events	7	3%



WORKFORCE PLANNING & OPTIMISATION

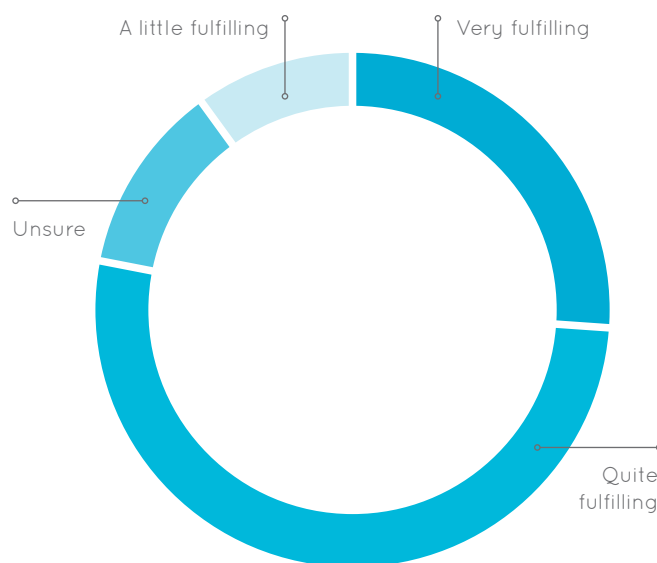
WHAT ARE YOUR TWO BIGGEST WORKFORCE PLANNING CHALLENGES?

ANSWER CHOICES	#	RESPONSES
Accurate forecasting	1	16%
Providing staff with flexible schedules	2	6%
Meeting service level goals	3	27%
Accurate intraday management of staff	4	16%
Inability to recruit staff	5	24%
Attrition	6	37%
Lack of training for the workforce planning team	7	4%
Recruiting workforce planners with the right skills	8	6%
Ineffective workforce planning tools	9	24%
Communication with marketing and departments that impact contact demand	10	22%
Other	11	10%



HOW FULFILLING IS THE WORK YOU DO?

ANSWER CHOICES	RESPONSES
Very fulfilling	28%
Quite fulfilling	48%
Unsure	14%
A little fulfilling	10%
Not at all fulfilling	0%



WORKFORCE PLANNING & OPTIMISATION SUMMARY

Workforce Management and Optimisation Summary

Nimesh Dhanak

Head of Sales – APAC

Call Design



The role of workforce management in today's new-norm world is ever critical, with 90% of the contact centres participating in this report having a dedicated workforce planning process in place. The proliferation of the remote workforce has meant our contact centres here in Australia as well as the world over have had to get increasingly creative in striking a balance between optimising company performance while ensuring they remain flexible and keep their staff engaged. The fundamentals of right person, right place, right time are at the core of doing just that however more flexible scheduling options and tools to improve engagement have also become essential.

One interesting finding was that of those surveyed, most of the responses were from inhouse contact centres. As you would expect, inbound voice and email channels still hold the top spot on the list of most planned customer contact channels with chat, outbound, back-office and social media closely following. What also emerged is that more and more workforce planning teams are doing the planning for back-office tasks as was highlighted by 50% of those surveyed.

Finding highly skilled workforce planners remains a challenge. Therefore, opportunities to grow are often given to staff internally. In fact, 50% of workforce planners started as agents. What is concerning is the lack of investment in specialist education and training for staff in this role and in the contact centre in general. Only 13.5% of the workforce planners who responded had external skills training which is not good for the industry. Furthermore, only 2% of those surveyed had 3rd party training on best practice WFM principles, again as most WFP's and TL's are being taught internally, on the job. This is far from ideal as bad habits can be passed down to new hires and information is inadvertently filtered or watered down especially when it comes to getting the most from your workforce planning tool and what it can and can't do.

While most businesses have adopted a purpose-built Workforce Management Solution, it is interesting to note that Excel still seems to play a relatively significant role both in forecasting and scheduling.

The migration to cloud-based systems continues with many organisations having already opted for cloud based WFM tools (57.7%). The benefits speak for themselves here with cost efficiency, scalability, more robust DR, evergreen versions being front of mind for most businesses.

When deciding on a tool, features and functionality are the key drivers. Only 2.3% looked at references and supplier reputation. This is interesting as not all vendors provide the same level of service and many users complain that they do not get the help they need once the tool has been installed. It would be interesting to understand who decides on the functionality list

and how much investigation is done on how these features would work, before the system is installed. This is further compounded by the fact that most workforce planners only receive internal training and upskilling. As a result, only 18.6% rated their workforce planning tool as excellent with most rating it as average (37.2%)

Of those surveyed and even those that are using a tool, it was almost a 50/50 split between using Excel or the WFM tool to forecast. That said, almost 70% rated the forecasting process as good or very good. Almost everyone (96%) measures forecast accuracy however only 20% measure to an interval level. The disadvantage of not measuring this at an interval level is that your customers are likely to receive inconsistent service throughout the day, depending on the time they try to contact you.

Most organisations create new schedules either weekly or monthly and provide these to staff 4 weeks in advance. However, these are not necessarily a completely new build to meet staffing requirements as most schedules are fixed or rotating. We expect this will need to change as we move forward with a remote workforce that is almost certainly here to stay and the increasing requirement to provide staff with more and more schedule flexibility.

Some quick stats: It is good to see that 94.1% of people capture changes to schedules quickly and update schedules almost in real time because this helps with the real-time decision-making process. 58% use Service Level as their primary goal while 23.5% are targeting SL and ASA. Hopefully this is for different lines of business within an organisation as service level and average delay do not align therefore cannot be targets for the same line of business. What we did find striking is that 7.8% use abandonment rate as a measure of scheduling success. Unfortunately, the reasons for customers abandoning are often external and out of the workforce planning team's control. Lastly, a few years ago contact centres were looking at removing adherence as a target for agents. It is good to see that this has returned with 86.27% measuring this.

Mobile apps are seen to have become an important way to improve agent engagement and address the attrition problem with 43.24% providing their staff with access to an app to view their schedules, apply for leave and do shift swaps. Offering staff more flexible schedules is key to retaining them, particularly in the new world of a flexible, mobile workforce.

Moving forward, we believe there will be more movement towards further enhancing the agent experience with increasing interest in solutions to either improve the experience such as gamification or streamlining processes with increased automation. Integrated systems are becoming more and more necessary and in particular, integration to payroll systems is critical to reduce human error and to keep payroll and workforce planning aligned.

WORKFORCE PLANNING & OPTIMISATION CASE STUDY

Information about nib

nib Group is one of Australia's largest and fastest growing health and medical insurance providers and constantly seeks to provide high-quality services through tentative bespoke customer service. Established in 1952, nib has a long-standing reputation in the healthcare industry and has continued to grow through the most challenging market landscapes. The customer support team at nib works hard to ensure the customers' expectations are exceeded in the most friendly and efficient manner.

nib provides health and medical insurance to over 1.4 million Australian and New Zealand residents and serves more than 190,000 international students and workers on temporary visas. nib is one of Australia's largest players in the travel insurance industry and is publicly listed on the ASX.

The nib contact centre is based across multiple locations with over 300 consultants. The company aims to continually improve brand experience through high quality customer service support, providing quotes and setting up insurance policies for new customers, all in a timely and efficient manner.

Motivation for Change

As a fast growing company, nib Group required ways to improve customer service experience and help lower costs. With nib's member base expanding, nib required more from their workforce management solution to continue the streamlined customer service experience on a more sustainable scale.

nib Group made the decision to change workforce management solutions to Alvaria Workforce Engagement Management with the Perform (real time adherence and agent productivity) module and WFO (online schedule and mobile app) modules.

Desired Solutions

Prior to nib using Alvaria Engagement Management, nib was in search of a solution that could:

- Boost agent engagement
- Create comprehensive forecasts
- Evaluate schedule adherence easily and provide employees with visibility of this
- Accurately forecast while encompassing a large number of variables
- Optimise schedules based on a large array of employee' skills and preferences
- Use the cloud to drive flexibility and provide remote access to information
- Quickly adjust schedules and breaks to manage customer contact demands
- Automatically schedule breaks and projects at the best times
- Help boost agent productivity without inducing burnout
- Use a mobile app to allow consultants to access their schedule information remotely

Why Alvaria?

The team at nib requires software to accommodate the complexity and large array of skills in their contact centre. They need a solution that can handle the various skill combinations and contact channels to forecast accurate staffing requirements. Having the ability to automate certain tasks, to save the team time and enable them to do more analysis, is also important.

Alvaria's WEM solution provides nib with the tools they need to test out the impact of different changes on their forecasts, as well as helping them find ways to provide better schedule flexibility for their staff, regardless of whether they are working in the contact centre or from home.

nib needs to provide different access to Workforce Planning information to various roles within the contact centre. The comprehensive security features in Alvaria WEM have enabled them to do this easily.

Call Design has taught us so much about workforce planning...they have a wealth of knowledge and that really helps the team here to do their jobs better.

Michael Stonehouse, nib Group Planning Expansion Lead

Why Call Design?

While Alvaria WEM delivers extensive benefits for nib's contact centre, having access to a team of highly experienced consultants at Call Design has helped the workforce planning team expand their knowledge, integrate the software with other technologies such as payroll and ensure staff continue to deliver high-quality customer service, without interruptions. nib wanted to work with a provider that would help get the most out of their solution and provide measurable ROI for their investment.

The knowledge provided to nib by Call Design continues to be highly informative and allows them to expand their knowledge of workforce management and apply this directly when using the new features released every year in the Alvaria WEM platform. During their recent upgrade, Call Design provided a service that nib described as being seamless. "We hardly noticed the transition at all, which is what we want when relying on the system to plan out our day." - Michael Stonehouse, nib Group Planning Expansion Lead.

The Results

With the implementation of the Alvaria WEM Suite, by Call Design, nib has been able to continually grow, and deliver best practice workforce planning.

The comprehensive capabilities of Alvaria WEM have enabled the workforce planning team to get the insights they need to make continual improvements across all member channels.

Tools specific to Alvaria WEM such as 'Employee Data Center' and 'Superstates' have made reporting on any staff activities, regardless of where the employee is working from, easy.

The 'what-if' features in Alvaria WEM enable nib to evaluate the viability of any forecast or schedule situation before going live. This enables nib to continue delivering high-quality customer service to their members across all channels.