



# WHITEPAPER

## CONTACT CENTER METAMORPHOSIS:

*Transforming Agents into Active  
Workforce Management Partners*

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## **Executive Summary**

The current scheduling paradigm in the contact center industry relegates agents to the role of mere hourly employees with no control over their work schedule and no real sense of empowerment as important team members. Workforce administrators are charged with managing staffing levels to meet intraday requirements, and because of the inherent stresses of addressing staffing variances and other intraday issues, administrators tend to discourage agents from making schedule-change requests. Accommodating schedule adjustments takes time and effort and adds to enterprise overhead – i.e., it is generally not worth the trouble. This white paper suggests that a new paradigm would end the conflict between agents and workforce administrators by turning them into partners in the effort to optimize contact center operations, and by, simultaneously, empowering them with capabilities they really want in their work environment.

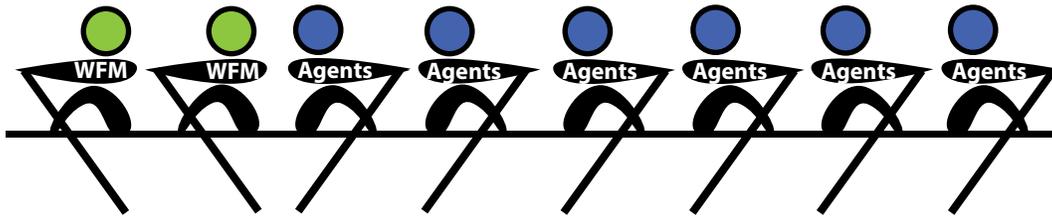
The current contact center employee paradigm places agents squarely in the traditional role of “hourly employee,” a term with, for some, pejorative connotations and the resulting negative perception of those engaged in hourly work. For many people, “hourly wage earner” tends to conjure certain stereotypes such as *low-skill, low-wage, unreliable, indifferent* and *uncommitted*. One source of these stereotypes can be found in traditional management policies for hourly workers that tend to discourage individual innovation and scheduling flexibility which are key drivers of employee engagement and commitment. In most contact center environments, agents are expected to perform the same tasks in the same way within a pre-defined range of performance and are discouraged from requesting schedule changes.

It is no wonder that annual contact-center- agent attrition rates average 33% and are among the highest of any hourly job, exceeding attrition rates in retail and the fast food industry. With the cost to replace an agent averaging \$10,000 or more, the cost to business of high agent attrition is enormous.

Since the average age of a contact center worker in the US is 23, this problem will only get worse. According to the US Chamber of Commerce, 75% of Millennials cite schedule flexibility as a primary driver for career choices. While most contact center operators recognize the increasing importance of providing scheduling flexibility to their workers, most still maintain schedule-change request policies that restrict scheduling flexibility, for example, limiting the number of schedule requests or requiring significant advanced notice. The primary reason cited by companies for these restrictive policies is the need to contain the cost of analyzing change requests to ensure they don't create staffing variances that can negatively impact operational performance.

This white paper suggests a paradigm shift – a new tack in which the conception of “contact center agent” transforms from “hourly worker” into “active workforce management partner” and in which companies can empower their agents with self-scheduling flexibility in a way that actually helps the company optimize contact-center staffing levels – creating a win-win partnership that improves contact center performance and agent engagement and commitment at the same time.

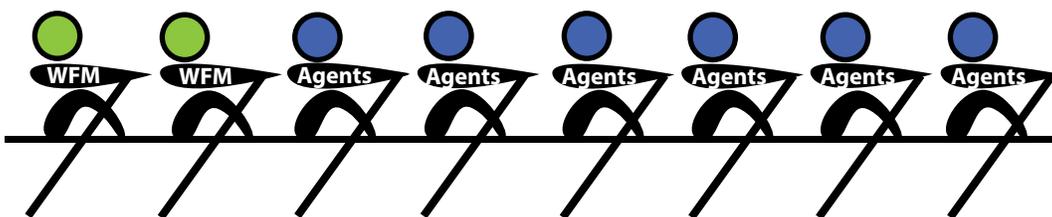
## The Intraday Staffing Challenge



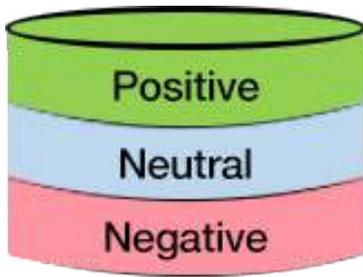
One of the most difficult tasks in a contact center is ensuring that there are the right number of agents to handle actual call volume throughout the day. Overstaffing adds unnecessary cost while understaffing creates customer service issues such as long wait times for calls to be answered. Forecasting and scheduling systems do not fully address unanticipated variances to call volume patterns and agent absenteeism, so the burden of optimizing intraday staffing levels falls to workforce administrators who have the responsibility to monitor intraday staffing variances and take corrective actions to address understaffing or overstaffing situations. The inherent time pressure to triage staffing variances, determine corrective actions, contact agents and update schedules makes this a highly stressful and challenging role. Activities such as reaching off-shift agents to request they come in to work and convincing on-shift agents to do overtime takes considerable effort with no guarantee of successful outcomes. As a consequence, over 70% of workforce administration resources are typically focused on intraday management activities. Adding to the stress are agent-initiated schedule change requests that require time to analyze and approve and that compound the challenge of ensuring optimized staffing levels.

The inherent delays in processing schedule-change requests with no guarantee of approval creates a source of significant stress for contact center agents.

## Empowering Agents as Active Workforce Management Partners



The key to achieving optimal staffing levels and high agent satisfaction at the same time is transforming your agents from impediments to staffing optimization into active partners for staffing optimization. Any agent-initiated staffing change, if accepted, will drive one of three outcomes relative to staffing-level variances.



**Positive Outcome:** Reduces the staffing variance (i.e., decreases understaffing or overstaffing)

**Neutral Outcome:** No effect on staffing variance (e.g., in case of swapping schedule with another agent)

**Negative Outcome:** Increases the staffing variance (i.e., increases understaffing or overstaffing)

Clearly, if all schedule requests could be guaranteed to drive positive or neutral outcomes, manual analysis and approval would not be required and the need for restrictive schedule-change request policies would evaporate, since, under this scenario, the more changes the agents make, the better it is for the business.

Empowering agents requires making schedule changes in a way that ensures each change actually helps optimize staffing levels by exposing agents to the same information workforce administrators already have – visibility into when staffing variances will occur, and into agent attributes (e.g., skills, hours worked, etc.)

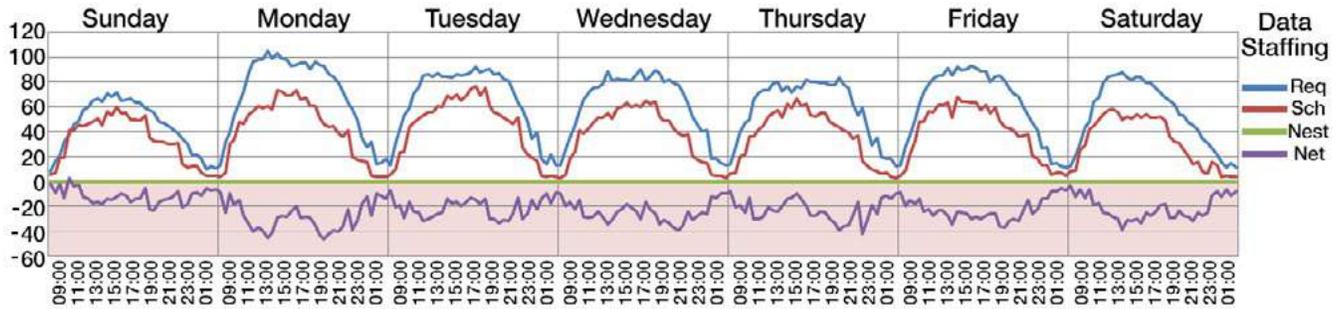
If companies provide agents with a user interface that shows only options for adding, reducing or adjusting hours that will drive neutral or positive outcomes, then they have effectively created an agent-self-scheduling paradigm under which the more schedule changes the agents make, the fewer intraday staffing variances there are for workforce managers to address. This paradigm creates a win-win-win for agents, workforce administrators and the business.

Full-scale agent empowerment requires that the technology also allow agents to set preferences on how and when they want to be contacted and when they do not wish to be disturbed. This information, together with the WFM-system data on their skill sets and the center's immediate staffing needs, determines which real-time alerts they receive for overtime or time-off opportunities.

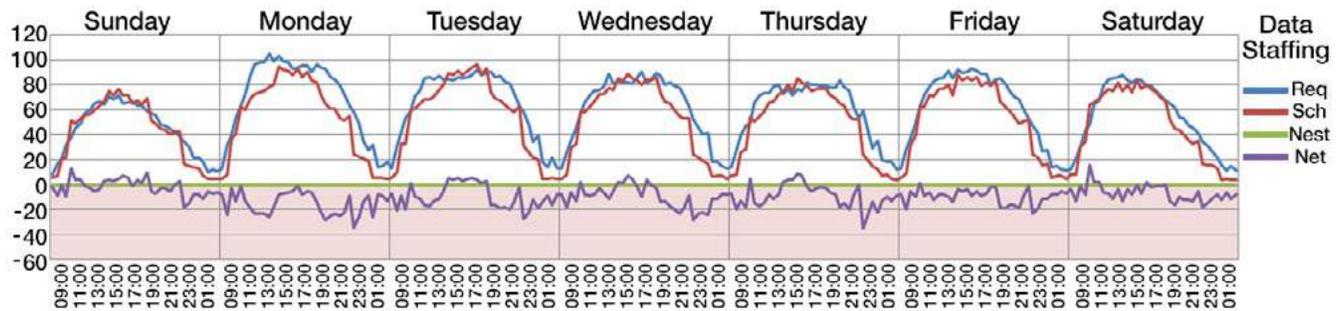
## **The Impact of Agent Self-Scheduling Empowerment on Operational Performance**

To see how impactful agent schedule-empowerment truly is on contact center operations, we can take a look at a real-world case study presented by Sutherland Global Services at the Soci-

ety of Workforce Planning Professionals Annual Conference in April 2015.



*Daily Staffing Variances before Intelligent Agent Self-Scheduling*



*Daily Staffing Variances after Intelligent Agent Self-Scheduling*

Evident in these staffing variance reports is the striking reduction of staffing variances after the introduction of intelligent agent self-scheduling practices. The data changes markedly. By eliminating negative-outcome schedule-change request options, Sutherland ensured that 95% of all schedule changes were now agent-initiated and automatically approved, and that agent utilization improved by over three hours per agent per month.

The result of agents acting independently to manage their own schedules and thereby optimizing staffing levels for the contact center is immense and significant. For agents, the authority to act on their own behalf lends control and autonomy that elevates them above the sense of powerlessness hourly-employee status can elicit. Surveys taken before and after deployment of scheduling technologies show conclusively how meaningful scheduling empowerment truly is for them. Post-deployment, agent scheduling satisfaction rose by 450%. Without the constant need to focus on staffing variances and contacting agents to remedy them, workforce administrators can redirect their energies to addressing other critical issues (for example, optimizing contact-center workforce scheduling practices).

## Implementing Intelligent Agent Self-Scheduling

The technology elements to support intelligent agent self-scheduling are already available on the market. Realizing maximum utilization and benefit, however, comes down to two key factors: (1) making the system easy to configure and maintain and (2) providing an agent user interface that is easy to access and use.

### System Configuration Considerations

The technology elements required to make an intelligent agent self-scheduling system easy to use and configure include:

- Automated Intraday Reforecasting to ensure the system has the most accurate view of when staffing variances will occur
- Configurable Threshold Management for the level of understaffing or overstaffing that will allow for automated approval of an extra hour or time-off request
- Automated Schedule Updating in the Workforce Management (WFM) System

### Agent User Interface Considerations

- Mobile App to enable anywhere/anytime access to the schedule and schedule change request system
- Visibility into pre-approved schedule changes
- Real-time Notification of change request approval

## Conclusion

By putting intelligent self-scheduling empowerment tools in the hands of agents, contact centers can transform their agents from mere hourly employees into active workforce management partners who can help optimize staffing and reduce the cost of workforce administration. Agent self-scheduling empowerment increases agent engagement and commitment, which ultimately translates into improved agent performance, improved customer satisfaction and reduced agent attrition and absenteeism.

For companies committed to customer satisfaction and employee empowerment, intelligent self-scheduling creates an opportunity to positively move the needle on both objectives.



## **About WorkFlex Solutions**

WorkFlex Solutions LLC is the industry leader in intelligent empowerment solutions for contact center agents, supervisors and workforce administrators. Our award-winning Intelligent Intraday Automation technology maximizes scheduling flexibility, optimizes intraday performance and reduces administrative overhead. Designed to integrate easily with Workforce Management (WFM) and Automated Call Distribution (ACD) systems, WorkFlex enables clients to leverage their existing enterprise investments, and quickly generate a positive ROI. WorkFlex SaaS deployments span multiple industry sectors including financial services, communications, healthcare, automotive, cable/sat and government.

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