



WHITEPAPER

Intraday Management *and the Strategic Value of* Intraday Automation

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Executive Summary

The powerful capabilities of Intraday Automation technology are quickly gaining traction in the workforce optimization (WFO) industry. Yet many contact center leaders do not fully understand the difference between Intraday Automation and the intraday features their existing workforce management (WFM) systems already provide.

This paper discusses the contact center intraday management function and clarifies the difference between Intraday Automation and the change management capabilities found in most workforce management systems. It highlights specific ways Intraday Automation serves to optimize workflows, automate manual tasks and reduce contact center administration. In doing so, it reveals the strategic value Intraday Automation technology provides in improving operational performance, increasing agent satisfaction and enhancing the customer experience.

Introduction

Maximizing the customer experience while running an efficient and profitable contact center is not an easy job, especially when you consider how delicate the balance between customer satisfaction and operational efficiency truly is. Volumes are in constant flux, as are the resources required to service them. Just when you think you've achieved the perfect balance between customer requirements and front-line staff, more changes roll in and it can feel like you are back where you started. Welcome to the reality of contact center intraday management.

In Aberdeen Group's research about the strategic value of intraday management, the analyst firm defines the term as a "systematic approach...to proactively manage the contact center agent workforce for optimal productivity and performance throughout each day." They go on to clarify that, for the purposes of their research, intraday management "doesn't include manual processes but rather activities automated through technology use." By adding this caveat, however, what they are actually describing is not the intraday management function itself, but the Intraday Automation technology high-performing contact center operations are beginning to use to support it. This may seem like a minor distinction, but it is an important one if business leaders are to understand how this powerful technology supports their contact center's intraday management function.

Users of Intraday Automation technology enjoy 55% greater agent utilization, 37% greater year-over-year customer satisfaction and triple the annual revenue growth when compared to non-users - Aberdeen Group

Like forecasting and scheduling functions, the intraday management function at many contact centers is supported by a workforce management system. But unlike forecasting and scheduling functions, which are almost entirely automated through the workforce management system, the bulk of intraday management tasks are still performed manually by supervisors and WFM team staff.

Besides being labor-intensive, the volume of manual tasks associated with analyzing staffing gaps, optimizing schedules and managing real-time agent performance threatens operational efficiency, employee productivity and intraday service level results. To mitigate this threat, high-performing contact centers use Intraday Automation technology.

The use of Intraday Automation could result in a 2% to 6% reduction in staffing expenses for contact centers with 300 or more agents - DMG Consulting

Understanding Intraday Automation

The term "Intraday Automation" is easy to confuse with the intraday management function

that it supports. Because of this, it is not uncommon for contact center leaders to believe they already have Intraday Automation technology. Contributing to this confusion are the change management features (often referred to as “intraday management”) that come pre-packaged in most workforce management systems. But despite a familiar sounding name, Intraday Automation technology is something altogether different.

What It Is

Simply stated, Intraday Automation technology is workforce optimization (WFO) software designed to supplement the change management capabilities found in traditional workforce management systems. Intraday Automation integrates seamlessly with existing workforce management platforms, automatic call distributors (ACD’s) and other contact center data sources enabling organizations to leverage existing technology investments.

What It Does

Intraday Automation intelligently automates activities associated with three common intraday workflows: staffing optimization, team performance management and schedule change request processing. In doing so, Intraday Automation is associated with the following benefits:

- *Improved contact handling and service level performance through faster data analysis and better decision-making*

- *Enhanced customer experience and reduced wait times through improved agent productivity and better schedule adherence*
- *Increased operational efficiency and reduced administration through improved communications and the elimination of repetitive manual tasks*
- *Reduced absenteeism and turnover through increased agent empowerment and greater levels of employee satisfaction*

Whom It Supports

While Intraday Automation ultimately benefits the entire contact center operation, it is intended to support the personnel whose daily activities directly impact a contact center’s intraday results: WFM teams, supervisors and the agent resources they manage.

- *Intraday Automation supports WFM team resources by automating the manual tasks associated with intraday staffing optimization.* This includes monitoring interval data, identifying potential over/under staffing gaps, determining and communicating a course of action and executing needed schedule changes. By extending their reach, Intraday Automation enables WFM teams to accomplish more with the same number (or fewer) resources.
- *Intraday Automation supports contact center supervisors by making it easier for them to manage team and individual*

agent performance. By proactively alerting them to potential issues requiring their attention and keeping them informed of company-initiated staffing changes affecting members of their team, supervisors spend less time monitoring team activities and more time coaching individual agent performance.

- *Intraday Automation supports agent resources by empowering them to self-manage their performance and their schedules.* This includes proactively reminding them about upcoming events, alerting them to potential adherence issues and equipping them with a mobile app that enables them to view and manage schedule changes anywhere, anytime.

How It Works

To better understand how Intraday Automation would work in your contact center, and more specifically, how Intraday Automation capabilities differ from those found in your existing workforce management system, ask yourself the following questions.

1. *Does your workforce management system automatically alert you to projected interval staffing variances for all of your various contact types and channels?*

A primary responsibility of every intraday WFM team is to monitor various screens and real-time dashboards in an effort to ensure optimal staffing levels. Changes in customer demand and

agent availability cause staffing coverage to become unbalanced and can quickly evolve into issues if not addressed in a timely manner. But at many contact centers, WFM team resources are stretched to capacity making it a challenge to find, let alone proactively respond to, every projected staffing gap that may need the team's attention.

With Intraday Automation technology, WFM team members are automatically alerted to coverage variances based upon the most current intraday forecast and pre-defined over/under staffing thresholds. Instead of wasting precious time throughout the day pouring through data contained in numerous screens and reports in search of issues, WFM team members are able to direct their efforts towards fixing them.

2. *Does your workforce management system automatically recommend solutions to remedy staffing variances based upon your contact center's specific business rules and policies?*

Even though it seems as if each day presents our contact centers with completely new challenges, the truth is that the large majority of intraday issues WFM teams face have been encountered many times before. Yet each time it is necessary to painstakingly review the details of a given set of circumstances and assess the potential impact of one course of action over another. In the time it takes to make a single decision, it is not uncommon for multiple issues to simultaneously arise in other areas of the business. With only so much

capacity, it is almost impossible for a WFM team to effectively “triage” every issue and determine which problem to act on first, let alone effectively address all of the staffing variances that occur across the business within a typical day.

Intraday Automation uses intelligent, rules-based decisioning technology to recommend specific actions to optimally address staffing variances based upon the organization’s preconfigured business policies. Instead of trying to determine how best to address all the carious staffing issues that arise throughout the day, WFM staff members can instead focus their efforts on executing the optimal course of action.

- 3. Does your workforce management system automatically identify the best agents to remedy a given staffing variance, contact them to let them know about the schedule change opportunity and then, upon acceptance, automatically update their schedules?*

Deciding on a course of action is one thing, but successfully rallying the right “troops” in order to execute a decision is another. In many contact centers, sign-up sheets and broadcast messages are the primary methods used to solicit resources for an overtime situation. The same is true when it comes to finding people who are willing to give up hours and volunteer to go home early. But these first-come-first-serve methods are unable to recognize agent preferences, scheduling constraints and

labor laws, let alone filter volunteers based upon their skill assignments. Ultimately, these manual approaches make an already challenging situation that much harder for WFM team members who are working against the clock to optimize contact center resources.

Intraday Automation technology makes identifying the most optimal agent resources a fast, effective and fair process by targeting specific agents based upon skill mix, availability and preferences for things like overtime and voluntary time off. In addition to making contact using the communication channel of the agent’s choice (phone, text, email, etc.), Intraday Automation technology updates each agent’s schedule in the workforce management system thus ensuring the accuracy of staffing lines and eliminating one more manual task from the WFM team.

- 4. Does your workforce management system automatically send personalized intraday adherence alerts to agents, supervisors and other operational leaders throughout the day?*

As is the case in many contact centers, WFM teams maintain constant communication with supervisors and other members of the operation to ensure those who need to know are informed of upcoming events, real-time adherence issues and intraday performance results. Manually preparing and distributing intraday reports while maintaining everyone’s awareness of the current state of each contact type and channel (not to mention each agent’s

schedule adherence), consumes a huge portion of WFM team resources. At the same time, operational leaders and supervisors don't have time to sift through pages of report data looking for information requiring their response. What they need is timely, actionable information specific to their interests and the needs of their team.

Intraday Automation technology issues real-time, relevant alerts personalized to the individual enabling them to take the right action at the right time, eliminating the need for manual intraday performance reporting. And instead of supervisors having to contact the members of their team about things like coming back late from break or staying too long in after-call work, Intraday Automation helps agents stay on track and focus on the needs of their customers with schedule activity reminders and real-time threshold-based performance notifications.

5. Does your workforce management system automatically communicate pre-approved, agent-specific schedule change opportunities that employees can preview and select directly from their mobile device?

Managing agent-initiated schedule change requests is a time-consuming, manual process, which is why many contact centers try to avoid it altogether. Instead, they encourage employees to meet personal needs by trading schedules with other agents. Many workforce management systems provide a mechanism for agents to post and process schedule trade

requests, but in today's omni-channel contact center, the task of finding other like-skilled agents willing to swap schedules is harder than ever. Only when agents are unable to broker a trade are they they allowed to submit a change request, but then they must wait hours (or days) for it to be reviewed and possibly approved by an already over-burdened WFM team. Despite being the way "it's always been done," agents who are used to managing many aspects of their personal lives via on-demand smartphone apps find the schedule change process archaic, inflexible and highly frustrating.

Intraday Automation technology automatically translates staffing variances into pre-approved schedule change opportunities, customized based upon individual agent skills and preferences, and communicates these opportunities to agents via their mobile device. While the ability to manage schedules on-demand offers agents an unprecedented level of empowerment and flexibility, Intraday Automation also serves to optimize staffing levels and improve intraday performance, relieving WFM team members of the manual effort associated with evaluating, responding to and entering agent-initiated schedule change requests. Agents receive instant approval, staffing levels are instantly optimized and workforce management systems are automatically updated making Intraday Automation technology a game-changer for agents and WFM team members alike.

Conclusion

Intraday management is one of the most important and strategic functions a contact center has. When approached in a purposeful and proactive manner, intraday management activities have the potential to make up for a less than perfect forecast and are capable of saving the day when the people we so carefully schedule to handle customer contacts are out sick, sitting idle or nowhere to be found. But this potential is difficult to realize when WFM teams and supervisors spend their days bogged down in a sea of manual administrative activity.

Just as workforce management technology supports a contact center's workforce management function, Intraday Automation technology supports a contact center's intraday management function. By supplementing existing workforce management capabilities, Intraday Automation frees supervisors and WFM staff members from the burden associated with manual intraday activities and enables agents to better manage their time away from the office. In doing so, it empowers everyone to focus on more impactful activities aimed at driving greater levels of productivity, performance and enhanced customer experience.

For more information, or to schedule
a demonstration, go to:
www.workflexsolutions.com



About Wise Workforce Strategies

Wise Workforce Strategies, Inc. is a contact center industry consulting and advisory firm that specializes in workforce management and workforce optimization best practices and technology. The firm's founder, Rebecca Wise Girson, is a 25+ year contact center veteran who has held leadership positions at AT&T Universal Card Services, Convergys Corporation, and two of the industry's leading providers of workforce technology. For more information, visit wiseworkforcestrategies.com.

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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. For more information, visit workflexsolutions.com

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