

Workforce Management and Today's Multi-media Contact Center



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Steven J. Murtagh
Managing Partner
Tyche Consulting Group



Contact centers used to be centralized locations for processing large numbers of telephone calls quickly and efficiently. Typically established to provide technical support, customer service or sales/telemarketing capability, the contact center's role was narrowly defined and tightly focused: handle as many calls as possible, as quickly and inexpensively as possible, at an acceptable level of service. In an industry where 100% turnover is not uncommon, filling the right seats at the right times to achieve required service levels or sales objectives has always been a challenging management problem. But the contact center has quickly moved away from its roots in technical support and telesales and has often become a multi-channel, multi-media, multi-purpose information center upon which organizations are growing critically dependent. According to The Help Desk Institute's Practices and Salary Survey, last year only 70% of "call center" service requests were received by phone. The rest were submitted through a variety of channels that included e-mail, FAX, IVR systems, web based chat and various internet portals. What used to be the challenging task of appropriately staffing your "call center" to provide high quality customer care has become the far more demanding task of balancing volatile business objectives, employee skillsets and schedules with the ongoing issues of recruiting, retention, training, and development. Call center staff planning IS NOW contact center workforce management.

Today's multi-media environment creates new and unique requirements that go well beyond the traditional staffing problem of matching people to call volume fluctuations. The skills required to respond effectively to customers over the phone can be distinctly different from a reply that uses e-mail or web-based chat. An agent who demonstrates a superior ability to assist customers through a phone conversation may lack the writing skills to provide the same level of assistance by e-mail. Basic typing skills are rarely an issue in regard to telephone support. But they may become a glaring issue if customers frequently utilize web-based chat for service. With more than half of contact centers now delivering services or support over the internet (and about 1/3 utilizing interactive web-based tools), mismatches between agent skills and task requirements are as serious a problem for the contact center as scheduling and staffing itself. And the cost of poor workforce management in agent turnover and customer dissatisfaction can be astonishingly high. A study I conducted back in 1995 indicated that the costs of replacing a single help desk agent were typically \$24,000, not including any possible customer satisfaction impact. It is safe to assume that costs have increased significantly in the ensuing years. Clearly, an effective workforce management plan and process is a key component of any contact center's success.

So what is a workforce management plan? And how does it differ from the staffing and scheduling activities with which contact center managers are already familiar? Staffing the contact center with the right types and numbers of people and managing dynamic work schedules to effectively respond to expected workload has always been a major part of any contact center manager's job. Sometimes it may seem as if there is little time for anything else. The requirements of the multi-channel contact center only compound the difficulties. If these staffing issues are addressed within an ongoing framework of recruiting, training, motivating and retaining the staff then it is much more likely that a

manager will achieve the kind of stable environment where time can be devoted to other pressing issues. Workforce management is a set of activities that seeks to create such an environment. Because it involves the coordinated interaction of numerous complex activities, having an overall plan or framework is important.

To be effective any such plan must address certain key items. Clear business goals must be established for both the workforce management effort and for the contact center overall. The specific products and/or services to be supplied must be defined, as well as the means by which they will be delivered. Just because it is possible to utilize numerous channels and technologies doesn't mean that every contact center needs to do so. Finally, the levels of service to be provided must be established. Failing to confirm and document these details will make it difficult to measure the extent to which your efforts are successful later on.

With services and delivery channels defined, and goals and objectives established, the skills of the current staff should be assessed. A formal skills inventory is the best approach. In addition to the technical skills needed to do the job be sure to consider supporting skills such as customer service, listening, writing and problem solving skills. Remember that the mix of required skills can be very different for different delivery and communication channels, even where the technical requirements are very similar. Don't overlook the analysis and systems skills necessary to support the enhancement of the contact center's own internal technology and processes. One size definitely does not fit all.

Creating a skills inventory should establish what specific skills are required in order to conduct the contact center's business successfully as well as the level of those skills among the existing staff. This forms the basis of a staffing plan and detailed work schedules. For the telephone or online chat portions of the business, traditional service level based scheduling methods are as applicable as ever. Many tools are available to assist, from simple spreadsheet type calculators to large, flexible queuing based applications. For the non-phone components entirely different methods may apply. For example, e-mail responses may be based on a simple total workload method. Customer self-help tools may require no staff at all to assist, but will normally require a significant commitment to maintenance and support. Matching skills and schedules to projected demand across multiple contact channels is increasingly a specialized skill in itself.

With the preceding elements of a plan in place the immediate, short-term workforce planning issues are covered. But success requires attention to longer-term concerns as well. A recruiting plan should be developed based upon a gap analysis of the differences between the skills available from the existing staff and those required (or projected to be required in the future). And this plan should be reviewed and updated regularly. A long term staff development and retention plan will protect your investment in your staff and greatly increase the odds of maintaining turnover at acceptable levels. Again according to the Help Desk Institute's 2006 Best Practices Survey, over 11% of technical support help desks provide no formal ongoing training to their staff at all. Review your training and

development plans and ensure that they are appropriate to the goals you have set. Training is generally a far more cost effective investment than recruiting.

While none of the elements of a good workforce management plan are beyond the capability of the typical contact center manager to define and develop, numerous tools and resources do exist to help with the task. These include staffing and workforce management applications, independent and vendor affiliated consultants, training courses, and printed and web-based reference materials. A good place to begin an evaluation of potentially useful tools is on the World Wide Web. Be sure to plan some time at your next conference or industry event to examine the latest vendor offerings and exchange ideas with your peers.

Workforce management is not something that can successfully be ignored for very long. The effort will be expended either in effective workforce planning and execution, or on damage control in response to the problems that failing to do so will inevitably create.