APPROACHES FOR ENGAGING AND ENHANCING EFFECTIVENESS OF CONTACT CENTER AGENTS

JUNE 2017
Intelligent Agent Empowerment Mobile App

Engaging & Enhancing The Effectiveness of Contact Center Agents
Topics

- Why schedule-change empowerment has become increasingly important for retaining an engaged and productive agent workforce.

- Operational-barriers to providing agents with schedule-change empowerment and how WorkFlex uniquely addresses them.

- A demo of the WorkFlex Intelligent Agent Mobile App.
Improving CSAT Is a Nearly Universal Strategic Priority

Is improving CSAT a Top 3 strategic priority at your company?

- Yes: 94%
- No: 5%
- Don’t Know: 1%

Source: 2017 SWPP Member Survey
While Agent Turnover Is Increasing for 1 of 2 Companies

Is agent turnover increasing at your company?

Source: 2017 SWPP Member Survey
“If we can drive Agent Satisfaction (which we can), then we can drive positive improvements in Customer Satisfaction and Agent Turnover”
Jeff Rumburg, Co Founder

Source: MetricNet Contact Center Benchmark Study
Increasing Strategic Focus on Agent Empowerment

Source: 2017 SWPP Member Survey

Does your company have a strategic initiative to improve agent engagement?

- Yes: 56%
- No: 26%
- Don’t Know: 18%
Changing Demographics Are Shifting Agent Sat Drivers

- ~70% of contact center agents in the US are now Millennials
- Most Millennial's consider schedule-change empowerment more important than opportunities for pay or career advancement
- 75% of Millennial’s say work-life balance is a primary driver of career choice

Source: US Department of Labor Millennial Research Study
Changing Demographics Are Creating a Perfect Storm

- ~70% of contact center agents in the US are now Millennials
- Most Millennial's consider schedule-change empowerment more important than opportunities for pay or career advancement
- 75% of Millennial's say work-life balance is a primary driver of career choice
- The sharing-economy is “siphoning off” the traditional contact-center labor pool

![Graph showing the growth of contact center and shared economy employees from 2013 to 2017. The graph indicates a significant increase in the shared economy employees, suggesting a shift away from traditional contact centers.]

Source: JP Morgan Chase Institute | WSJ.com
Assume the average current wage of a contact center worker at your company is $15.25 per hour.

Would your agents be willing to earn a lower wage in return for schedule-change empowerment?

- Yes, for up to a $1.00/hour reduction in pay
- Yes, for up to a $0.50/hour reduction in pay
- Yes, for up to a $0.25/hour reduction in pay
- Yes, for up to a $0.10/hour reduction in pay
- No
Agent willingness to accept a pay cut in return for schedule-change empowerment

One-third of companies say their agents would accept an average pay cut of ~2.5% in return for schedule-change empowerment.

Source: SWPP Membership Survey 12-16
Schedule-Change Empowerment Barriers

If schedule-change empowerment is so key to retaining an engaged and productive agent workforce, then why aren’t more companies offering it?
Schedule-Change Request Processing Overhead Cost

Management Approval Check-List

➢ Projected Staffing Variance Impact
➢ Regulatory Compliance
➢ Company Policy Adherence
➢ Avoid Creating Perceptions of Bias
➢ Timely Communication to Agents
➢ Timely WFM System Updating

Engaging and Enhancing the Effectiveness Of Contact Center Agents
Overhead Cost for a 500 Agent Contact Center

If it takes 10 minutes to manually process a schedule-change request and each agent makes 5 schedule change requests per week, you would need to hire 10 full time workforce administrators just to process your agent schedule-change requests!
The Schedule-Change Empowerment Challenge

How to address the “trade-off” between the benefits of schedule-change empowerment and operational support costs.
WorkFlex Intelligent Agent Mobile App

- Native Mobile App (iOS, Android) Provides Anywhere/Anytime Single Icon-Click Access to Schedule and Performance Metrics
- Personalize Communication Channel Preferences
- Predefine Time Periods of Interest for Extra-Time and Time Off
- Preview and Select Pre-approved Schedule-Changes with Instant Confirmation
  - Extra-Time, Time-Off
  - Swap Work-Hours
  - Change Work Activity

Work-Life Balance Empowerment
Agent Schedule-Change Empowerment Use-Case

How long would it take for an agent at your company to make the following changes to their schedule for tomorrow:

- Come in an hour early
- Take an hour vacation time at the end of their shift
- Take another hour off at the end of their shift but make it up later in the week
- Change some of their work activity from phone service queue to email service queue

<table>
<thead>
<tr>
<th>Less Than 5 Minutes</th>
<th>Under Half a Day</th>
<th>The Whole Day</th>
<th>Just Not Possible</th>
</tr>
</thead>
</table>
- Come in an hour early
- Take an hour vacation time at the end of their shift
- Take another hour off at the end of their shift but make it up later in the week
- Change some of their work activity from phone service queue to email service queue

Agents get the work-life balance empowerment they really want.

Supervisors get improved agent engagement, performance and retention.

Workforce Administrators get reduced administrative overhead and reduced intraday staffing variances.
WorkFlex Mobile App Impact to Agent Satisfaction

Agent Survey Questions

- How easy is it to trade your schedule with other agents?
- How easy is it to take time off and make it up at another time?
- How easy is it to view your schedule?
- How easy is it for you to determine when Time-Off or Extra-Hour opportunities are available?
- How easy is it for you to modify your schedule?

Source: WorkFlex Client Surveys

Workforce Management and Performance Optimization
WorkFlex Mobile App Impact to Agent Satisfaction

Agent Survey Questions

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Source: WorkFlex Client Surveys
WorkFlex Mobile App – Impact to WFM Operations

Before WorkFlex Mobile App Deployment
- Contacts Forecasted: 22505
- Actual Contacts: 24036
- Delta: 1531
- Forecasting Inaccuracy 6%
- Staffing Variance 19%

After WorkFlex Mobile App Deployment
- Agents Scheduled: 120
- Agents Required: 148
- Delta: 28
- Scheduling Inaccuracy 3%
- Staffing Variance 10%
- Call Handling Gap Reduced by 50%
- Staffing Variance Reduced by 47%

Actual Contacts: 24036
Contacts Handled: 23335
Delta: 701

Source: Sutherland Global Services Case Study
About WorkFlex Solutions

- WorkFlex is the industry leader in Employee Empowerment Solutions for contact centers
- WorkFlex SaaS products extend the capability footprint of WFM systems to improve contact center employee empowerment, performance and retention
- Our patented Intelligent Intraday Automation® technology has been actively endorsed by major WFM system vendors and recognized by leading industry consultants and analysts.
WorkFlex Intelligent Empowerment App Portfolio

**For Agents**
- Work-Life Balance
  - Instant Schedule Access
  - Predefine Preferences
  - Easily Adjust Schedule
  - View Performance

**For Supervisors**
- Team Effectiveness
  - Monitor Agent/Team Performance and all schedule change requests
  - Automated Adherence Alerting
  - Control Agent VTO/OT Eligibility

**For WFM Administrators**
- Intraday Staffing Agility
  - Intelligent Rules Engine
  - Automated Reforecasting
  - Real-Time Intraday Alerting
  - Proactive Staffing Optimization

Workforce Management and Performance Optimization
Thank You For Participating in Today's Session

For More Information Visit Our Website

- Product Brochures, Videos
- Industry Articles, White Papers
- Client Case Studies

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ADAPTIVE WORKFORCE OPTIMIZATION

Diana Leccese
RVP Performance Management and Back Office Solutions
Emerging Workplace Expectations Are Shifting

THE PAST

My Paycheck
My Satisfaction
My Boss
My Annual Review
My Weakness
My Job

OUR FUTURE

My Purpose
My Development
My Coach
My Ongoing Conversations
My Strengths
My Life
Traditional Performance Management Needs Disruption

Disengaged Employees

33% of US employees are engaged in their job

Ineffective Managers

21% of employees agree their performance is managed in a way that motivates them to do outstanding work

Disappointing Future

18% of employees strongly agree that employees who perform better grow faster at their organization

GALLUP
Time For a Change - Adaptive WFO Transformation

From Employee Measurement To Employee Empowerment
Employee Empowerment

Adaptive Goals
Individualized, Self-adapting, Future-oriented

Adaptive Insights
Proactive & Predictive delivery of insights
Auto root cause analysis
Next best action recommendation for immediate improvement and coaching

Adaptive Action
Achievement-oriented Gamification

Create Accountability

Establish Expectations

Continually Coach

Attributes

Preferences

Metrics

Adaptive Insights

Adaptive Action
Early Warning for At Risk Employees

Coaching Effectiveness

Coach the Coach, Adaptive Goals

Assembling the Contact Squad

Adaptive Scheduling

Adaptive Training & Gamification
QUESTIONS?

www.nice.com/adaptivewfo
The Big Question

In Workforce Management, what is the number one thing you can do that will increase profitability?
The Big Question

In Workforce Management, what is the number one thing you can do that will increase profitability?

Increase Accuracy
Creating Forecasts

Our Forecasting Tool is optimized for multi-channel and omni-channel environments.
Forecasting in Vantage Point
### Creating Schedules


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<th>Staff Required</th>
<th>Staff Provided</th>
<th>Difference</th>
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<td><strong>108</strong></td>
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</table>
Real-Time Adherence

See what your agents are doing in real-time, so you can quickly make adjustments to boost productivity and performance.
Increasing Accuracy of Your Forecasts and Schedules.

It’s All About the Algorithms

Better Algorithms Yield Better, More Accurate Results
By Increasing Accuracy
The impact on your contact center operations can be significant.

Total Calls Answered
Percent of Calls Answered Within Desired Service Level
Average Handle Time

+24%
+38%
-5%

Results shown based on previous customer performance.
By Increasing Accuracy
The impact on your contact center operations can be significant.

-7%  
Average Payroll Cost Per Hour of Handle Time

-36%  
Average Queue Wait Time

+12%  
Total Monthly Handle Time

-25%  
Overtime Hours

Results shown based on previous customer performance.
By Increasing Accuracy
The impact on your contact center operations can be significant.

-12%
-9%
+10%

Workforce Management Administrative Hours
Abandoned Call Percentage
Ratio of CSRs Per Supervisor

Results shown based on previous customer performance.
Pipkins’ All-Inclusive Workforce Network™
The Accurate Workforce Management Solution and Much More

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Introducing Pipkins’ new mobile app. We’re taking Mobile WFM to a whole new level.

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SwiftPik™ for Android coming soon!
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### Approaches for Engaging and Enhancing Effectiveness of Contact Center Agents

<table>
<thead>
<tr>
<th>Rafael Manzon, Executive Vice President of Sales &amp; Marketing, Pipkins, Inc.</th>
<th>Larry Schwartz, Chairman and CEO of WorkFlex Solutions, LLC</th>
<th>Diana Leccese, Regional Vice President at NICE Systems</th>
</tr>
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**QUESTIONS**