ROUND TABLE – WORKFORCE MANAGEMENT TIPS AND TECHNIQUES

FEBRUARY 2017
Intelligent Agent Empowerment Mobile App

Tech Tank: Workforce Management 2017
About WorkFlex Solutions

- WorkFlex is the industry leader in Intelligent Intraday Automation® for contact centers

- WorkFlex patented technology extends the capability footprint of existing WFM systems to improve contact center employee empowerment, performance and retention and has been endorsed by leading WFM system vendors

- Our industry-unique capabilities have been recognized leading industry consultants and analysts
Improving customer satisfaction is a “Top 3” strategic priority for almost all companies.

Regardless of customer service operations size.

Source: SWPP Membership Survey 12-16
"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
Agent Turnover Is Linked to Agent Empowerment

Agent turnover is increasing for almost one out of two companies.

The majority of companies have a strategic initiative to improve agent empowerment.

Source: SWPP Membership Survey 12-16
Changing Demographics Are Creating a Perfect Storm

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

Schedule-Change Empowerment Is Key

Sources: US Department of Labor Millennial Research Study, JP Morgan Chase Institute | WSJ.com
So What Is Schedule-Change Empowerment

- Ability to view your schedule anywhere/anytime
- Pre-define interest periods for extra hours and time off
- Receive alerts for schedule-change opportunities of interest
- Submit any number of schedule requests with no advanced notice
- Receive automated approval notification with minimal delay
- Take time off or add time to current schedule
- Take time off and make it up at another time
- Swap schedules with another agent
- Change work-activity (e.g. voice to chat, email or training)
**Schedule Change-Empowerment Availability**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None of the Options</td>
<td>4%</td>
</tr>
<tr>
<td>Change work-type (e.g. from voice to chat or email)</td>
<td>5%</td>
</tr>
<tr>
<td>Swap schedules with another agent</td>
<td>86%</td>
</tr>
<tr>
<td>Take time-off currently assigned schedule</td>
<td>80%</td>
</tr>
<tr>
<td>Add hours to current schedule</td>
<td>58%</td>
</tr>
<tr>
<td>Take time-off and make it up at another time</td>
<td>50%</td>
</tr>
<tr>
<td>Pre-define interest periods for extra-hours or time-off</td>
<td>39%</td>
</tr>
</tbody>
</table>

What schedule-change empowerment options do you currently offer your agents? (Select all that apply.)

Source: SWPP Membership Survey 12-16
Which of the following schedule-change empowerment capabilities do you currently offer your agents when they are at work? (Select all that apply.)

- Automated approval of schedule change requests: 32%
- Submit any number of schedule change requests: 38%
- Submit schedule change requests with no advanced notice: 38%
- Ability to view schedule change opportunities: 48%
- Receive alerts for new schedule change opportunities: 35%
- Ability to view schedule: 99%

Source: SWPP Membership Survey 12-16
Which of the following schedule-change empowerment capabilities do you currently offer your agents when they are not at work? (Select all that apply.)

- None of the options: 60%
- Automated approval of schedule change requests: 12%
- Submit any number of schedule change requests: 14%
- Submit schedule change requests with no advanced notice: 12%
- Ability to view schedule change opportunities: 20%
- Receive alerts for new schedule change opportunities: 12%
- Ability to view schedule: 33%

Source: SWPP Membership Survey 12-16
Current Employees (Agent Retention Value)

- Yes, for up to a $1.00/hour reduction in pay: 6%
- Yes, for up to a $0.50/hour reduction in pay: 6%
- Yes, for up to a $0.25/hour reduction in pay: 9%
- Yes, for up to a $0.10/hour reduction in pay: 12%
- No: 67%

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

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 (e.g., add hours, take time-off, modify work hours or assignments anywhere/anytime via mobile app?)

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

Prospective Employees (Agent Recruiting Value)

- None of these options: 8%
- Increase wage offer only by $1.00/hour: 58%
- Increase wage offer only by $0.50/hour: 23%
- Increase wage offer only by $0.25/hour: 15%
- Increase wage offer only by $0.10/hour: 10%
- Keep wage offer the same but provide schedule change empowerment: 36%

Assume the average starting wage of a contact center worker at your company is $13.75 per hour. Which of the following options would improve your recruiting success? (Select all that apply)

One-third of companies said prospective employees would prefer schedule-change empowerment over a starting salary increase of between 5% and 10%.

Source: SWPP Membership Survey 12-16
Survey Correlation to Agent Demographics

If Approximately 70% of US Agent Workforce Are Millennials

50%+ of Millennials Consider Schedule-Change Empowerment More Important Than Pay

Then

One-Third of Agents Should Value Schedule-Change Empowerment Higher Than Pay

One-Third of companies said their agents would accept a pay cut averaging $60/month in return for schedule-change empowerment

One-third of companies said schedule-change empowerment was more effective than a starting wage increase averaging $110-$220/month
Schedule-Change Empowerment Is Becoming a New Currency

Agent-Engagement Crossroad

Wage Premium

Schedule Change Empowerment
Intelligent Agent Mobile App

- Native Mobile App (📱, 📱) Provides Anywhere/Anytime Single Icon-Click Access to Schedule and Performance Metrics
- Personalize Communication Channel Preferences
- Predefine Time Period 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
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

Win-Win-Win for Agents, Supervisors and WFM Administrators
WorkFlex Agent App Improves Agent Satisfaction

Agent Survey Questions

- How easy is it to trade your schedule with other agents?
- How easy is it for you to take time off and make it up at another time?
- How easy is it for you 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
WorkFlex Agent App Reduces Staffing Variances

Before WorkFlex Intelligent Mobile App

- Contacts Forecasted: 22506
- Actual Contacts: 24036

-6%

- FTE Scheduled: 120
- FTE Required: 148

-19%

Source: Sutherland Global Services Case Study
Intelligent Agent App Reduces Staffing Variances

Contacts Forecasted: 22506 Actual
Actual Contacts: 24036
Contacts Handled: 23335

45% of gap closed

FTE Originally Scheduled: 120
FTE Required: 148
FTE Revised Scheduled: 133
54% of gap closed

After WorkFlex Intelligent Mobile App

Data Staffing

Source: Sutherland Global Services Case Study
Single Icon Click Access to Schedule
- View Schedule by Day, Week or Month

Set Preferences
- Communication
- Extra-Hour, Time-Off

Adjust Schedule
- Extra-Time, Time-Off, Swap Work-Hours
- Change Work-Activity
- Trade Schedule with Another Agent
WorkFlex Intelligent Empowerment App Portfolio

For Agents
- View Schedule
- Set Preferences
- Adjust Schedule
- View Performance

Work-Life Balance

For Supervisors
- View Team KPI’s
- Message Agents
- Monitor Change Requests
- Control Agent VTO/OT Eligibility

Intraday Staffing Agility
- Automated Intraday Alerting
- Automated Staffing Adjustments
- Manual Staffing Adjustments
- Rules Configuration

Team Effectiveness

go to www.workflexsolutions.com to learn more
See Our WorkFlex Intelligent Mobile App Video

http://workflexsolutions.com/workflex-mobile-app-demo/
EVOLVE WFM

Workforce Management for everyone, anywhere
<table>
<thead>
<tr>
<th>The Problem</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Initial Hardware Purchase</th>
<th>Upgrade Hardware Purchases</th>
<th>Initial Professional Services</th>
<th>New Hire Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upgrade Solution Training</td>
<td>Lengthy Upgrades</td>
<td>Upgrade Professional Services</td>
<td>Delay for new features</td>
</tr>
<tr>
<td>Dedicated IT Staff</td>
<td>Down time for patches and upgrades</td>
<td>Initial Solution Training</td>
<td></td>
</tr>
</tbody>
</table>

- **Large CAPEX Expenditures**
- **Dynamic Size of Workforce**
- **Cost of building Disaster Recovery & High Availability**

**Lengthy Implementation**

**Cost of building Disaster Recovery & High Availability**

**Down time for patches and upgrades**

**Delays for new features**

**New Hire Training**
Removing the barriers

- Easy of Use
- Fast time to value
- No downtime or upgrades
- No need for Professional Services
- Continuous Feature Delivery
- No Lengthy Training
- No Hardware
Evolve To A Pure Cloud Solution Designed With You In Mind
Thank You

For more information
www.NICE.com/evolvewfm

Paul Chance
Paul.Chance@NICE.com
Workforce Optimization
Employee Engagement
Workforce Optimization Employee Engagement
How About Self-Service for Your Employees, Too?
Employees are provided the option for opt-in through their preferred notification channel; and manage their schedules when on the go on their terms.

Remote Employee Access

Use SMS, chat, & IVR for scheduling

Remote access for scheduling

Automatically send notifications for voluntary OT, time-off, etc.
Self-Service for Branch Staff with Aspect® Mila™

- Leverage consumer technologies to improve staff engagement across the branch
- Use interactive self-service natural language text communication, so agents can ask questions “Can I take tomorrow off?”
- Integrate with WFM and performance management to enable interactive conversations
- Automate WFM scheduling rules to permit and approve scheduling requests in real-time
- Deliver reminders to employees and trigger automated tasks to optimize operations
How WFO can improve **service**, **sales** and **productivity** in the while meeting consumer demands.
If you'd like to talk with our sales team, call us at 1-888-791-5931
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Q&A