

# An Analytical Approach to Workforce Management

*Replacing Frustrating Traditional  
Reports with a Killer Application  
that Optimizes Staff and Contact  
Center Performance*



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## EXECUTIVE SUMMARY

Traditional reports are at best clumsy mechanisms for improving contact center performance. They flood contact center staff with unsorted detail, much of which has little relevance to effective operations, and supervisors and managers spend far too much time using spreadsheets and other ad hoc tools to turn data into actionable information—information that usually arrives too late to be useful.

The solution lies in analytical applications that automatically deliver specific types of information—selected for their relevance to business goals and job functions—to staff throughout the contact center in easily understood formats that allow users to view the information from different perspectives and drill down into the granular details.

These applications not only save time and money by freeing staff from the task of sorting and arranging statistics, but also enable everyone from agents to managers to understand the root causes of contact center performance and to take swift corrective action when performance is substandard.

This white paper describes the principles of analytical applications and demonstrates how Aspect has applied them to a specific application for optimizing the performance of the contact center workforce. Workforce management is a critical factor in cost-effective operations and in maintaining high service levels, and Aspect has chosen this function for the first analytical application in what will eventually be a family of analytical solutions that cover every facet of contact center operations.

# An Analytical Approach to Workforce Management

## *Replacing Frustrating Traditional Reports with a Killer Application that Optimizes Staff and Contact Center Performance*

### **Analytics vs. reporting: what's the difference?**

Traditional call center reporting is based on the ability of automatic call distribution (ACD) systems to generate statistics. ACDs are very good at counting things like the number of calls handled, the amount of time that callers waited before their calls were answered, how long customers and agents remain on the line, and how many calls were routed to particular agents, agent groups, or call center sites.

#### **The old way: production reports**

It has been standard practice in most call centers for many years to bundle these kinds of statistics into production reports that regenerate regularly for distribution to supervisors and managers. Production reports are simple, one-dimensional tools, and their widespread use is mostly a result of the fact that until very recently, they've been the only game in town.

Production reports do have their uses, of course. They're excellent for analyzing long-term trends, and they are a good source of detailed statistics for any call center that has to provide reports to government agencies that mandate service levels. But as a tool for managing the contact center workforce and for optimizing day-to-day operations, they have serious shortcomings.

One disadvantage is that production reports are static. Snapshots of call center activity at a particular point in time, they are out of date as soon as they are generated. Another, more serious problem is that production reports give a very broad and general view. They are, after all, unsorted collections of information, much of which has little or no relevance to effective operations.

It is the need to sort and organize statistics that makes production reports a clumsy and inefficient way to seek actionable information. It involves knowing which statistics are relevant, extracting them from the clutter, analyzing what you've extracted, and doing something about what you learn from it.

And all of that means that using traditional reports to try to manage your contact center better ranges from woefully ineffective to counterproductive. Your managers spend a lot of time using spreadsheets to crunch the raw numbers and try to draw conclusions, time that could be spent on other critical tasks such as coaching and supervising agents.

The results of their efforts usually don't get done in time to be useful, since the production reports themselves are out of date as soon as they are generated—and even more out of date by the time your analysts have massaged the data. It is not uncommon, for instance, for agents to receive their performance results for a particular quarter after the quarter has ended—far too late for them to use the information to improve their performance and earn quarterly bonuses.

### **The effective way: analytical applications**

Analytics is something new and altogether different. An analytical application is a focused management tool that:

- Selects information based on predefined application logic tailored to specific activities and business drivers
- Offers different views for different users, based on their job requirements
- Provides an easy-to-use interface that lets users navigate through the information, looking at it from different perspectives and drilling down to the most granular level of detail in order to identify root causes and truly understand what is going on in the contact center
- Includes tools for communicating with contact center staff and taking quick corrective action when performance falls short of business goals

All this makes analytical applications much more desirable, both from the standpoint of cost and the standpoint of effectiveness, than traditional production reports.

Because analytical applications are tools designed to accomplish a specific purpose rather than collections of raw data, the time-consuming work of sorting the data to find what is relevant to operational and business requirements has already been done. Analytical applications don't just dump statistics on manager desktops; they deliver selected information that applies directly to the pressing concerns of running the contact center efficiently and of supporting business goals.

An equally important advantage is the structured presentation of the information. A good analytical application automatically presents the right information to the right people in a timely manner and in a format that is easy to comprehend. Add to this the ability to move through the information at will and the ability to communicate corrective actions, and you have what managers have needed all along—an effective tool for meeting business goals.

## Applying analytics to a specific function: workforce management

Analytics as a general principle applies to any contact center data and all contact center reporting. But it is most effective if it is applied to specific contact center functions.

Workforce management is an obvious place to start. For one thing, there's plenty of data to work with. Workforce management applications are a source of detailed data about forecasts, schedules, and schedule compliance. Managing the workforce effectively is one of the most important contact center functions, both from the standpoint of containing costs by preventing overstaffing and maintaining service levels by avoiding understaffing. And all of the advantages that analytics offer—quick access to relevant information, job-specific displays, and tools to communicate and take corrective action—are directly applicable to the processes of managing and motivating the contact center workforce for maximum efficiency.

### How the application works

Applying analytics to workforce management is fairly simple in concept. The application draws its information from the workforce management software. The information is selected and presented in the form of key performance indicators (KPIs) based on domain expertise from specialists in contact center best practices. These KPIs focus on the measurements that really affect contact center efficiency and effectiveness and that prevent users from being swamped by a deluge of irrelevant detail.

The KPIs are displayed on dashboards tailored to the specific job requirements of different groups, such as agents, supervisors, managers, and control desk staff. Each dashboard displays only the KPIs relevant to the task of the person using it, and each offers the right degree of control for its user group.

Two important characteristics of these dashboards are clear, easily comprehended displays of information and flexible, intuitive navigation based on the real requirements of the user. Color-coded displays, for instance, tell users at a glance whether performance is above, at, or below target levels. Users can also choose between numeric and graphic displays, and easily accessible menus allow them to change views, drill down, and quickly pinpoint root causes.

Once users have determined what is going on in the contact center and why, a good analytical application also gives them tools to take prompt action that improves performance. Managers, supervisors, and control desk staff can change target levels and performance objectives for agents, groups, or the entire enterprise.

### **Moving from supervision and management to leadership and teamwork**

What makes this kind of application such a revolutionary advance over traditional reporting techniques is its effect on contact center efficiency and productivity. By automatically distributing KPIs to the entire contact center staff, workforce management analytical applications enable them not just to know what is going on in the contact center, but also to understand it.

Agents who are falling short of their goals can adjust their performance or communicate with supervisors about identified causes. Supervisors can coach agents, set group and individual goals, and motivate workers. And managers can manage effectively on an enterprise level rather than getting bogged down in detail. In short, analytical applications allow the contact center staff to go beyond supervision and management to teamwork and leadership.

### **Aspect's approach to the concept of analytics**

Aspect is in the process of applying its domain expertise as a pure-play contact center vendor with nearly two decades of expertise to analytical applications for the contact center. Our first offering is Aspect® Performance Optimization for eWorkforce Management.

It delivers all the features and benefits described above, offers easy installation, and requires no customization. It receives data from the Aspect eWorkforce Management software and includes 100 standard KPIs selected for their relevance to contact center efficiency. (We reasoned that most businesses will need the same KPIs, and that to start out, quick implementation and low cost will be important factors.) An Aspect PowerStart installation service is available, and, for an additional fee, purchasers can add up to two more data sources.

Customers wishing to significantly expand the functional characteristics of the product—with additional data sources, custom KPIs, alerts and notifications, process automation, and a range of other important capabilities—can also purchase AIMCall, supplied by Aspect partner AIM Technology.

AIMCall, the platform on which Aspect Performance Optimization is built, is a flexible, highly customizable application for developing custom contact center performance-management applications. It makes it possible to develop performance dashboards that can integrate selected data and KPIs from any number of enterprise sources, taking performance management beyond agent and operational metrics. AIM Technology designed it for extensibility and flexibility, so it includes no defined KPIs or data sources, and customers will have to purchase professional services to deploy it.

Working together, Aspect Performance Optimization and AIMCall make it possible to integrate data from applications such as quality monitoring, financial, and human resource packages with data from Aspect eWorkforce Management Core, Intra-Day Performance, and Perform. This consolidation of data, in turn, enables contact center staff to manage not only performance, but also customer satisfaction, sales results, bonuses, and a range of other enterprise functions.

Available from Aspect, AIMCall integrates fully with Aspect Performance Optimization, significantly expanding the analytical capabilities of that product and improving return on investment.

## Empowering the entire contact center staff

Aspect Performance Optimization for eWorkforce Management delivers actionable information via four job-specific dashboards. The following scenarios demonstrate the effects of each on contact center efficiency.

### Agent

Knowing that his quarterly bonus is based on meeting schedule compliance targets, a call center agent uses the Performance Optimization agent dashboard to check his performance.

The easy-to-read color-coded display tells him that he is below target. He knows that he's getting to work on time and that he hasn't been leaving early, and he knows that while he's on shift, he's productive. So he needs to find out what is preventing him from earning his bonus.

His first question is whether his schedule compliance had been below par only recently or over a longer period of time. By changing the time period to a longer increment, he confirms that his compliance has been consistently low for the last month and a half.

Further analysis indicates that the problem occurs at the same time each day—just after lunch. This reveals the root cause of the problem. The agent's afternoon shift is scheduled to start at exactly the time his lunch break ends. He's getting back from lunch four or five minutes after his scheduled start each day, and it's making a big difference in his schedule compliance. So using Aspect eSchedule Planner, he requests a minor schedule change that gives him five more minutes to get from the cafeteria to his workstation.

### Supervisor

A team leader uses Performance Optimization to monitor the number of calls her team is handling. Her dashboard indicates that the team is seven percent below the target level. Before she takes action, she needs to know whether the whole team is falling behind or just one or two agents are holding the team average down.

By drilling down to individual agent performance, she finds that most of her team members are actually handling more calls than they're expected to, but two agents, both recent hires, lag well behind the group. From that point, it is a simple matter of watching them handle a few calls and asking them how the work is going.

The team leader sees that both agents are slow with after-call wrap-up work, and that's what causes them to answer fewer calls. An experienced agent herself, she gives them some tips on handling the wrap-up work efficiently, and their call-handling average goes up. The team begins to reach and ultimately exceed its goal.

### Manager

A call center manager is using Performance Optimization to monitor the entire center. Average handle time is in the red. By drilling down, she is able to determine that one particular type of call—purchase requests in response to a television sales campaign—is the cause.

She contacts the supervisor of the group handling the campaign and discovers that many of the agents assigned have little experience in processing this kind of special offer. She knows that the center has handled this kind of campaign before and that more experienced agents are on shift, so she instructs supervisors to alter some assignments to put the more experienced agents on the task.

Handle times drop, and as a result, the number of calls handled rises.

### Control desk

A control desk manager is monitoring multiple sites, comparing forecast call volumes, schedules, and actual traffic and staffing. He sees that actual staffing is lower than scheduled staffing. He does a time analysis by period of day and then drills down to each site, locating the cause of the deviation at a single site. The forecast for the site indicated that 100 agents would be needed. 105 were scheduled. But only 95 are on hand.

The control desk alerts the site of the shrinkage, and the site finds the cause. Mandatory scheduled training is making agents unavailable for shifts. Knowing the cause, the site can adjust schedules to eliminate the shrinkage, and the control desk can use other KPIs to assess the effectiveness of the training and determine whether it is valuable enough to justify.



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