

Vacation Scheduling Without Pain: Automating Holiday Leave Planning

By Dennis Cox

Even at its easiest, scheduling vacations for call center agents can be more challenging than a game of chess. The majority of agents typically want to take at least some of their vacation days during the summer and winter holidays when the children are out of school and family get-togethers tend to occur. In most cases, those are the precise times when call volumes are at their highest. Careful strategy is required to arrange all the “pieces” in order to avoid being improperly staffed during busy seasons.

For call centers with 50 agents or more, one logical solution is an automated vacation planning system that allows customer service representatives to submit requests electronically and then intelligently fits agents into the available vacation slots based on a set of rules established by call center managers.

These systems save hours of administrative overhead involved in manually receiving, evaluating, approving and denying vacation requests, while also helping to avert staffing shortfalls that can send call center service levels tumbling.

If staffing is just 2% below where it should be, for example, the percentage of calls answered within 30 seconds or any other established performance objective typically will drop by 10%. If 10% of the seats that should be filled are empty, fully half of the center’s incoming calls will likely not be answered in the desired time interval. To make matters worse, understaffing at some points of the year will undoubtedly cause overstaffing at others, leading to wasted labor expense.

With automated systems that are able to handle sophisticated variables ranging from staffing by agent skill set to re-assignment of unused vacation slots, call center managers can defuse these time bombs, preserve employee morale, and keep operations running smoothly.

Automation Options

There are two ways to automate the vacation planning process. The first is with a standalone software application that handles vacation planning and nothing else. The second is by utilizing the vacation planning module available as part of many of today’s advanced workforce scheduling systems.

Either option will reduce clerical overhead, but a vacation planner that integrates with your workforce optimization program will be far more efficient and accurate. Staffing needs as determined by the workforce management system can be used to calculate available vacation slots. Vacation schedules stored in the larger system will be instantly accessible to the vacation module, enabling agents to view total slots and slots remaining without manual data entry or data import. Once vacation time is granted, the main system will be automatically updated, and the vacation will be included in the agent’s schedule when produced. If the vacation is cancelled

after it has been posted, the system will adjust accordingly. These and other features save time and eliminate errors.

Functions for Agents

Regardless of the software platform selected, the vacation planning system should offer a number of key components to optimize the vacation planning process. First, the system should provide a variety of self-service functions to customer service representatives. Agents should be able to:

- 1 – Check their personal vacation eligibility**, including their earned, used and available vacation days.
- 2 – View available vacation slots**, in order to see whether their desired time is available.
- 3 – Submit or bid on desired vacation dates**, with either automated rules-based approval of agent requests or manual supervisor allocation based on seniority or other corporate rules.
- 4 – Check request status**, including requests that are pending, granted and wait-listed.

These do-it-yourself capabilities lessen the clerical burden on call center managers or schedulers. They also instill a sense of fairness by enabling agents to see how vacations are allocated and giving them a degree of control over their time-off schedules.

Functions for Managers

The functionality for call center managers must be much more extensive. Specific features will vary from program to program, but a vacation planning system should be able to support highly sophisticated scheduling as well as different corporate policies that will affect vacation booking such as different work weeks or Saturday rotations. At minimum, it should enable supervisors or schedulers to:

- 1 – Import each agent’s vacation eligibility for the year**, preferably directly from the organization’s HR or personnel system for maximum efficiency. Alternatively, the data can be imported from a spreadsheet or input manually.
- 2 – Set vacation limits for different parts of the year**, including how many total weeks can be booked during a certain time period, how many of those weeks can be taken consecutively, and other parameters established by corporate policy.
- 3 – Set ‘blackout’ days where no vacation is allowed**, such as major promotion periods where every available seat must be filled.
- 4 – Support both vacation bidding and automatic rules-based approval of vacation requests**, allowing supervisors to use the method they prefer. In the case of bidding, agents should be able to bid for preferred dates to be allocated manually based on pre-established

policies such as seniority, rotation or first-come-first-serve. In the case of automatic approval, the system should be able to inform the agent if all or part of the requested slot is not available.

6 – Allocate vacation slots by agent group, in order to prevent too many agents with the same skill set, in the same call center or in other group categories from taking vacation simultaneously. Separate groups can be created for billing, sales, and customer service, for example. Limits can then be set on the number of vacation slots allowed in a given week to each of those groups.

7 – Limit advance booking of vacation requests, such as permitting only full weeks to be booked more than three months in advance and allowing partial or full days to be booked no more than four weeks in advance. This helps equalize vacation opportunities.

In addition, a vacation planning system should offer a wide range of advanced functionality, such as the ability to roll over unused vacation slots between groups or set tolerances to create extra slots under certain circumstances. Some systems also can be used to schedule non-vacation-related time off such as sick time, personal time or training. A flexible and comprehensive system will produce the best results.

Fringe Benefits

Automating the vacation planning process yields a variety of benefits for the call center. It allows managers to gain central control over vacation requests, with the ability to implement rules in a clearly objective manner that can help prevent staff accusations of unfair treatment. It reduces clerical requirements and associated costs. It gives staff and supervisors instant visibility into vacation schedules.

In many cases, the vacation planning system used in a call center can also perform the same duties elsewhere in the organization, from the back office to the sales department. The company therefore can extract maximum value from a single software investment.

Perhaps most importantly, automated vacation planners give call center managers the tools they need to balance agents' vacation requests with the call center's business needs. That in turn can help increase agent satisfaction, employee retention, quality of service and the bottom line. And when it's your turn to request time off, you may find that what goes around comes around. That trip to the Bahamas may be as close as your vacation request screen.

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