

Transforming the Call Centre with evolved Workforce Management

Part 3 of Workforce Management Foundations, by Jeff Austin

Call centres, typically, only use workforce management (WFM) to ensure maximum logistical efficiency by maintaining the most effective balance between staffing and service level requirements. However, WFM can add much more strategic value and be a transforming business enabler. In this article, the last in a three part series looking at how to leverage your WFM capabilities, Jeff Austin, Managing Director of Siyandza Skills Development Training, examines how properly applying the strategic outputs of an evolved WFM department can convert a call centre from a reactive to a proactive business.

In the previous two articles in this series, we looked at how to make sure the foundations of WFM – forecasting and scheduling – are in place and how correctly integrating Capacity Planning into the process is the key to evolving WFM into a powerful strategic decision making tool. For more on these topics see [Part 1: Laying the right Workforce Management Foundations](#) and [Part2: Exploiting the strategic value of Workforce Management](#).

In this third and final article, we will examine how properly applying the strategic outputs of an evolved WFM department can transform a call centre from a reactive to a proactive business.

Playing catch up

One common example of reactive organisational behaviour is 'Service Level Catch Up'. In this instance, should a Call Centre have a monthly service level goal of 80% and discover that it is only achieving 70%, the business will cut training, coaching and other overheads to ensure more calls are answered to increase the service level.

This may boost service levels in the short-term, but only at the expense of the cut overheads and the knock-on effects of such reductions that will be reflected in impaired performance in the medium to long-term. These effects will have to be responded to in turn and, consequently, the organisation becomes trapped in a cycle of weakening, reactive behaviour.

In a well-planned (and executed) business, however, **proactive training and recruiting** can take place and changes in the business are more proactively managed. For example, service levels, and associated staffing requirements, are monitored and managed throughout the month to ensure target service levels are attained consistently. Recruitment is also planned better, giving the HR team time to hire the right people and performance against operational targets can be reported on and proactively managed.

Embedding a proactive approach

Once the core WFM basics are in place and Capacity Planning has been integrated into the WFM process (see Parts 1 and 2), an organisation will be making much better strategic decisions and no longer merely reacting to its environment, but it is unlikely to be responding completely proactively either.

The key to embedding a proactive approach within the organisation is to leverage off the evolved WFM department and engage it in:

- Monitoring the **operational environment** and identifying decisions well before they need to be made so effective planning can take place.
- **Eliminating common reactive triggers** by assisting every department to formulate effective risk mitigation strategies.
- Preventing **avoidable financial restraints** through the development of a dynamic budgeting process (based on dynamic ratios and forecasts).
- Assisting in the setting up of a **dynamic operational performance tracking process**, including providing feedback on performance against specified targets.
- Supporting **internal staff development strategies** (i.e. anticipating future requirements based on probable call volume growth).

A sure sign that the WFM department is providing the required inputs across the Call Centre is the expanded collection of stakeholders it starts providing feedback to. Prior to its evolution, the key WFM stakeholders are often only Call Centre agents and Team Leaders, but once the WFM team has been properly integrated, the stakeholders, typically, expand to include the **Call Centre managers and owners**, the IT department, the finance department, and the overall organisation (when the Call Centre is integrated to the delivery channels in the organisation).

Key characteristics of evolved WFM

The following hypothetical comparison illustrates the differences between an organisation that has an

evolved, integrated WFM department and one that does not. In a business that does not have a fully evolved WFM department:

- Staffing levels are maintained based on 'what is needed' and 'what was needed last month';
- Targets may exist, but they are frequently not reported against;
- The finance department operates within an 'organisational silo' and budgets created may or may not reflect the reality of what has happened historically in the business;
- The business (production facility) has little visibility or understanding of what the Call Centre does;

Overall, the business is reactive – only hiring people when they are needed immediately and often disregarding the fact that it usually takes three weeks to recruit and two weeks to train them;

- If a forecast is created, it may or may not reflect reality;
- Risk is reactively managed.

If the same business has a fully evolved and leveraged WFM team:

- Staffing consistently matches call volumes and staffing schedules are optimised. In addition, a flexible resource pool is maintained to handle unplanned spikes in call volume;
- Targets are understood by all stakeholders and reported against as needed, critical targets are monitored and reported against in real-time;
- The WFM department partners with all stakeholders in a dynamic budgeting process;
- The business (production facility) has customer demand clearly and frequently communicated,

including forecasts of where it will be in the future so required adjustments can be made to meet demand;

- Forecasts are created using accurate historical data, key trends are understood and managed on a real-time basis;
- Risks to the business and goal attainment are identified before they occur and are proactively managed;
- Service levels are consistently attained;
- The business is proactive, identifying staffing and equipment needs before they occur.

The well-planned business

As the above comparison makes abundantly clear, the correct application of the strategic outputs of an evolved WFM department can **transform a Call Centre from a reactive to a proactive business**. This is important because there is really only one commercial advantage left in the modern marketplace: agility – how swiftly an organisation is aware of changes in its environment and how fast it can respond to them.

The fundamental role of the workforce management – ensuring the business is operating at maximum logistical efficiency through maintaining the optimum balance between staffing and service level requirements – remains essential, but, as this series has hopefully demonstrated, in the case of the well-planned business, it's not about just having the numbers, it's what you do with them.