



## **Workforce Management 1-2-3: The Art and Science of Forecasting, Scheduling, and Meeting Service Goals**

### **DAY 1**

#### **Module 1:**

##### **Introduction to Workforce Management**

What is workforce management (WFM)  
Impact of poor WFM  
What makes call center staffing unique  
The basic steps of workforce management

#### **Module 2:**

##### **Data Collection and Analysis**

The data collection process  
Sources of call data  
Data validation/dealing with aberrations  
Business drivers and factors

#### **Module 3:**

##### **Forecasting Call Center Workload**

Time series analysis  
Calculating trend  
Identifying seasonal patterns  
Calculating day-of-week factors  
Identifying time-of-day patterns  
The impact of special events  
Shortcut forecasting approaches

#### **Module 4:**

##### **Planning Resource Requirements**

Defining service goals: Service level, ASA  
Calculating average handle time  
The relationship between workload and staff  
Calculating staff workload  
Erlang staffing models  
Case problem: Step-by-step staffing design

#### **Module 5:**

##### **Understanding Staffing Tradeoffs**

Service versus staff relationship  
Economies of scale  
Agent occupancy  
Consolidation case problem  
Calculating staff for outbound calling  
Calculating staff for email demands

### **DAY 2**

#### **Module 6:**

##### **Scheduling Call Center Staff**

Balancing contact center and agent needs  
Basic scheduling principles  
Calculating schedule requirements  
The impact of workforce shrinkage  
Coverage objectives  
Components of scheduling  
Shift span  
Days on/off  
Start/stop options  
Schedule creation case problem  
Implementation challenges and tips

#### **Module 7:**

##### **Managing Daily Schedules and Service**

Tracking schedule adherence  
Monitoring intra-day variations  
Tracking and reporting service  
Daily reaction strategies  
Staffing plans  
Call flow strategies

#### **Module 8:**

##### **Managing Attendance and Adherence**

Impact of adherence problems  
Quantifying the impact  
Diagnosing reasons for non-adherence  
Adherence strategies  
Attendance strategies

#### **Module 9:**

##### **End-of-Course Review and Assessment**