

# Latest Workforce Management Tools Aim to Empower Agents

by Greg Levin

*New self-service technology gives agents more input into the WFM process and their schedules—and more control over their lives.*

At call centers using the latest workforce management (WFM) applications, agents who complain about crummy schedules may have nobody to blame but themselves.

Agent self-service/empowerment is emerging as the name of the game in today's WFM technology arena. The latest tools—which have allowed call centers to place the entire scheduling process online—enable staff to quickly and easily access schedules, request/negotiate vacations, bid for and swap shifts, and enter their preferences for things like days off and start times, all right from their desktop or home PC.

This is not to say that agents are being handed total control over their scheduling destinies, but experts agree that the new tools do give frontline staff more input into and influence on the workforce management process.

“This opportunity to ‘push’ responsibility and accountability to the agent population is revolutionary and results in a new configuration for workforce management teams around the world,” says Daryl Gonos, co-founder of The Workforce Management Group Inc.—an independent consulting firm dedicated exclusively to WFM issues in call centers. “Large agent populations that previously had hundreds of exceptions per day funneled through the workforce analysts become an extension of the workforce management team. Suddenly, agents are workforce managers!”

And of course the WFM analysts aren't complaining. With agents taking a more proactive role in scheduling—and with the ease, consistency and convenience the new Web-based tools provide—managers/supervisors in charge of WFM can now focus more on analysis and contact volume trends, and less on manual scheduling tasks that have historically placed them behind the eight ball.

“How much of your supervisors' time would be saved if the manual schedule assignment and bidding process were eliminated?” Gonos asks. “What if you could cut scheduling calls to supervisors and support staff in half?”

## A Closer Look at the Key Features

Nearly all the big providers of WFM applications—Aspect, Blue Pumpkin, IEX, CenterForce, Pipkins, et. al.—have introduced products featuring Web-based, agent self-

service scheduling modules. While there are some differences among these tools in terms of specific features and level of maturity, they are quite similar in function—as well as in what they aim to offer managers and agents.

Here's a look at some of the key capabilities that today's WFM products provide:

- **Easy agent access to scheduling information.** Via a workstation or home PC (or via designated kiosks), agents can access their own schedules, view an up-to-date summary of their requested and remaining time off, as well as check the vacation dates that are available in the call center. In products such as IEX's TotalView, color-coded calendars and user-friendly screens assist agents in making new requests and modifying old ones.

- **Agent input and self-service.** Using their Web browsers, agents can request time off, submit scheduling preferences and trade shifts. Once an agent makes a request, it goes into a queue, where it is quickly processed in the order in which it was received. The system accepts or denies each request based on the specific rules that have been defined by the call center's workforce manager/team, then notifies the agent of the result, typically via an email message.

- **Waitlist option.** If an agent's request for time off is denied, or if the agent sees that the days they want off are not available, they can place themselves on an automated waitlist for the specific time slot requested.

- **Streamlined communication between managers and staff.** Tools help workforce managers quickly communicate unexpected schedule changes to agents throughout the call center. For instance, Aspect's eWorkforce Management features a “Notification Server” that not only automatically alerts managers when schedule changes are necessary due to sudden changes in call volume, but also immediately notifies agents of any resultant schedule changes made by managers. As Aspect points out in its product literature, “Managers no longer need to make telephone calls, type and send email notifications, print and post reports, or walk through the contact center personally notifying employees of schedule changes.”

For more articles on Workforce Management Tools, visit the Workforce Management Professional Interest Area's Reading Room on the ICMI member Web site: [www.icmimembers.com](http://www.icmimembers.com).

## The Impact on Agents

While today's WFM tools represent an obvious boon to workforce analyst's and managers, it's the potentially positive impact these tools have on agent morale, performance and retention that has most people talking.

"The fair application of well thought-out business rules and the assignment of responsibility to the agent for helping to manage and control their schedules absolutely increases agent morale," says Gonos. "Call centers that offer this type of access and service to their agents not only will have reduced turnover, but will have an easier time recruiting new agents."

Call center managers at JetBlue Airways couldn't agree more. Since implementing Blue Pumpkin's Director-Enterprise product—and empowering agents with unlimited shift-trading privileges—JetBlue has seen big increases in agent motivation and satisfaction, as well as a 30 per-

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cent increase in agent productivity, a 38 percent increase in service levels, and a 50 percent decrease in management workload per agent.

"To be a customer-centric business, you first need to be employee-centric," says Julie Strickland, call center analyst for JetBlue. "[By allowing agents to be more self-managing in scheduling], we can now design staffing scenarios that the majority of people are happy with, and that also make business sense. And the motivational, productivity and financial benefits ultimately mean our customers receive the best service and lowest airfares."

Managers at WorldCom Inc.'s call centers, where IEX's TotalView is the WFM product of choice, have also found that offering agents more input into their schedules has a profound impact on their morale and commitment. "We love it," says Sukjin McCloud, global customer care inbound/GOCC manager for WorldCom. "The Vacation Planner [feature] has been a great asset to both our agents and our staffing department in terms of productivity, efficiency and employee satisfaction."

It's not just the increased empowerment that animates agents in call centers using the latest WFM tools, but also the improved scheduling consistency those agents perceive, says Gonos. Because everything is automated via a single system—and because agents get a better glimpse of the scheduling process in action—frontline staff are less likely to complain about subjectivity or favoritism.

"Previously [accessing schedules, requesting exceptions, etc.] was a semi-automated or manual process that, in all likelihood, differed from group to group or business unit to

business unit," Gonos explains. "There was a sense of unfairness about the process and at least a small degree of subjectivity applied to exception requests, trades, etc."

## A Delicate Balancing Act

Of course with the potential benefits of new technologies and tactics come new challenges. While putting more WFM power in the hands of agents can indeed produce positive effects in the call center, it can also result in scheduling chaos and agent alienation if careful analysis and a sound strategy aren't a part of implementation. According to Gonos, lack of process design is the primary reason that today's WFM technology succeeds or fails.

"It is essential that the business managers define and document the processes and constraints that are associated with these new agent empowering capabilities. The rules need to be clear and understood before deploying the [technology], ...before [workforce managers] can be freed from tedious data-entry administration. ...The biggest challenge is creating the business rules that reflect your culture and making sure that the mechanism is universally fair to agents."

Among the questions that Gonos suggests managers address include:

- What is the approval process for accepting or denying a requested exception?
- Who gets notified and how?
- How does the agent get confirmation?
- How many exceptions can be requested in a month, a quarter, etc.?
- Do new agents have the same rights as senior staff?
- How can we crosscheck skills for agents trading shifts?

Even the vendors themselves agree that call centers need to fully understand the implications of using the latest WFM tools prior to implementation.

"The delicate balancing act between customer needs and employee needs must be addressed," says Debra May, general manager of IEX corporation. "If agents are allowed to control their schedules to a significant degree, chaos will ensue and customers will be negatively impacted as undesirable schedules are left unfilled. [It's important that] management maintains control of the mix of schedules needed to serve the customer, while providing agents an opportunity for schedule selection."

Security is another issue that call centers need to consider when implementing Web-based WFM tools. Managers must decide whether or not the center is going to provide Web access to the internal server, says Gonos. While there is not a big risk in giving agents such access, some call centers have adopted a more controlled "kiosk approach," where agents make scheduling requests and receive information at a dedicated kiosk rather than at their workstation or home PC.

Other call centers have addressed the security issue by contracting with a hosted WFM service, such as eResource

Planner, which “offers agent empowerment and reporting tools that sit outside of the firewall that is generic to and interfaces with common workforce management systems like TCS 4.X, Pipkins and IEX,” Gonos explains. He adds that, in addition to enabling call centers to take advantage of Web-based WFM tools without compromising security, using a hosted service like eResourcePlanner enables centers to test such tools with only a minimal investment.

### **WFM Revolution Under Way**

Gonos acknowledges that making the move from a traditional WFM system to one that is Web-based and that empowers agents isn't easy. However, he feels that once

more call centers begin to discover the benefits of doing so, WFM will never be the same again.

“We at WFMG believe that agents should be given as much control over their lives as possible, and applaud the self-service model as the biggest innovation since the industry stumbled through skills-based scheduling,” says Gonos. “The impact of agent empowerment will be with us for years to come and will be shaping resource teams that have responsibility for schedule optimization and daily execution of workforce management plans. It is really exciting to see workforce management technology make this giant leap.” ■