WorkForce Management Training Classes:
Tips for Success

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1. Set up success criteria. Determine the benefits you expect from the class and relay these to your provider. These should be realistic and concrete and include specific language such as; Be able to generate more accurate forecasts, Develop a usable set of optimized schedules, Understand how to apply intraday management tools, Determine a set of useable reports to monitor performance.

2. Pick the right setting. Isolate your team in an area where they can really focus on the new solution. Try not to let your team drift in and out of the session. We know they have a center to run but make arrangements for the "B" team to run the operation. You may want to see about setting up special session hours with your provider. Come in extra early and end at 3 PM, for instance, so they can keep a pulse on the operation. You can also set up two planned half hourly breaks for this purpose and perhaps go a little longer to make this up. Your provider should accommodate suggestions like this readily.

3. Send the right people. Workforce management is not an administrative function and the team should consist of individuals that have management perspective and some level of authority to respond to the information that the system will provide. They should be analytical in nature and fluent with PC's. We generally say that for a 150 agent contact center you should allocate one full time WFM resource and one additional for each 100 agents. Make sure you send a backup resource as well.

4. Get the class materials early, manuals, etc. and review and familiarize yourself with the content. Know what you are going to cover. In preparation for the class, you should be well prepared with any supplies you may require for the class (i.e. notepad, writing utensils, etc.) Also, if there is to be handouts or manuals utilized during the training, make sure you possess all of them.

5. Collaborate with the vendor on a detailed agenda that is focused on your objectives. Be informed of what exactly will be trained in the coming class. Some examples of items that may or may not be taught in a standard WFM Training Class include 'Types of Agent Staffed', 'Types of Incoming Traffic', 'Infrastructure of your Computer Environment', and 'Types of Shifts to be Scheduled'. Get a sense of the teaching philosophy, is it listen and learn, interactive, hands-on or all of these. This will help your team have the proper expectations.

6. Use your data. If possible, train with your data. WFMG has observed that deployment cycles for the providers include a "training class" that is really your team sitting around entering data into the system. While it is important to understand the mechanics of system setup and adding and deleting agents and queues etc, this is not the best use of time. Send the relevant data (call history, agent names, login id's, skills, queues, groups, activities, shifts and schedules on any electronic media for population into the system. Have the provider train the "workforce management cycle." See our last three newsletters.

7. Meet the trainer in a conference call in advance. Ask about their history running an operation. Training the users on how to setup and navigate the application is only part of the objective. Your team must understand how to apply the system to your culture without disrupting your operation or agent morale. Your trainer must have this perspective to understand your challenges. Unrealistic optimized schedules that will not support your environment or the needs of your agents are not good solutions.

8. Talk to other users. You checked references during your due diligence. Call them for advice now! Find out what they thought about their class and how it could be better. Ask them for the keys to their experience and how and why it was successful.

9. Focus on production. The mechanics are essential but stay focused on generating the outputs necessary to deliver the benefits of the technology.

10. Cover the providers support procedures before moving forward. Make sure you understand the exact procedures for contacting your provider. Make sure you understand the escalation procedures.

11. Complete a training class debrief meeting. Document the class in process and report to management and your provider on the overall success. Do not be afraid to ask the provider to step up to gaps in knowledge. It is in everyone's best interest to get all questions answered.