

# Agent scheduling best practices checklist

To help you seamlessly implement these best practices, we've created this handy checklist. Use it as a guide to ensure your scheduling process is both efficient and agent-friendly.

## Get ahead with advance schedule publishing

- Publish schedules at least two weeks in advance.
- Aim for a month or more for optimal planning.
- Ensure agents have access to their schedules well ahead of time.

## Keep it consistent for agent well-being

- Assign consistent schedules whenever possible.
- Ensure agents have regular days and start times.
- Utilize scheduling templates for ease and efficiency.

## Empower choice with a smart shift bidding system

- Implement a clear and fair shift bidding process.
- Allow agents to select preferred shifts for a set period (3-6 months).
- Clearly communicate how shifts will be distributed (merit, seniority, etc.)
- Set expectations upfront to manage any potential disappointments.

## Define flexibility with clear expectations

- Establish clear guidelines for PTO requests and schedule changes.
- Communicate these expectations to agents to increase approval chances.
- Ensure agents can see potential conflicts and request timelines in advance.

## Boost flexibility by partnering with a BPO

- Consider bringing in a BPO to cover challenging shifts (nights, weekends, holidays).
- Integrate BPO partners into your WFM plan using schedule integration features.
- Ensure seamless communication and operation between internal teams and BPO partners.

## Elevate engagement with regular agent input

- Create a feedback form or establish a regular check-in process for agent experience.
- Actively seek agent feedback on scheduling and workplace improvements.
- Implement small adjustments based on feedback to enhance the work environment.

### ABOUT ASSEMBLED

Assembled is a Support Operations platform that helps companies maintain exceptional customer experiences, no matter what lies ahead. Leading brands use Assembled's workforce and vendor management capabilities to make optimal staffing decisions, gain visibility into performance and productivity, and unlock new ways to serve evolving customer needs.

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