A New 👀 Vision 👉 for Workforce Management

Assembled

Organizations are facing unprecedented challenges—and powerful new opportunities—in serving customers. A key enabler is effective workforce management: getting the right people and supporting resources in place at the right times. Those who modernize their approach will be positioned to thrive. Those who fail to adapt will pay the steep price that comes from unhappy customers and employees.

This guide explores how workforce management is evolving, the forces driving change, and essential areas of focus that will enable you to maximize the impact of workforce management and set your organization up for success. Sections include:

The role of workforce management

Today's contact centers (also known as "support centers," "customer care centers," or, simply, "customer centers") provide a powerful means of communication between customers and organizations. They handle work that is inherently escalated—the complex issues not immediately resolved through search, online resources, self-service capabilities, or other means. When managed well, they enable customers to quickly reach the help they need, and empower the organization to listen and learn from these interactions.

Contact center management: The art of having the right number of properly skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality. (ICMI)

The International Customer Management Institute (ICMI) defines contact center management as "the art of having the right number of properly skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality." This definition can be boiled down to two major objectives: 1) get the right resources in place at the right times, and 2) do the right things.

There's a sensitive balance between the workload (customers who need help) and the staff and supporting resources required to handle that work. The scenario illustrated by the table highlights a typical middle-of-the-road service level. As shown, being understaffed creates an enormous queue, leading to customer frustration and stress on employees. Yet, being overstaffed provides little additional value due to the law of diminishing returns.

Average handling time: 5 min.
Customers in half hour: 100

Employees/ SL/20 sec.	Number of customers waiting longer than X seconds											
	5	10	15	20	30	40	50	60	90	120	180	240
17 (11%)	90	90	89	89	88	87	86	85	82	79	74	69
18 (39%)	65	64	62	61	58	56	53	51	45	39	30	23
19 (59%)	46	44	43	41	38	35	33	30	24	19	12	7
20 (73%)	32	30	29	27	24	22	19	17	12	9	5	2
21 (83%)	22	20	19	17	15	13	11	10	6	4	2	1
22 (89%)	14	13	12	11	9	8	6	5	3	2	1	0
23 (93%)	9	8	7	7	5	4	4	3	2	1	0	0
24 (96%)	6	5	4	4	3	2	2	1	1	0	0	0

Because of the need for balance, workforce management (WFM) has always been central to contact center management. The traditional aspects of WFM—forecasting the workload, calculating the people and supporting resources required, creating sensible schedules, and making any needed real-time adjustments—will remain vital. The underlying principles of work-force management will never change.

And yet, just as flimsy biplanes have given way to the space age, contact centers have become high-tech hubs of communication that are almost unrecognizable to their forerunners. In many cases, WFM practices and tools have not kept up.

Forward-thinking organizations are reimagining the role of WFM. They're building on the responsibilities of the past and tapping the potential of WFM to strengthen services and boost business returns. Doing so requires an understanding of the forces of change, then harnessing WFM to help in four distinct areas: shaping the customer access strategy, cultivating process and technology support, building cultural strength, and identifying returns on improvement. Together, these steps are positioning WFM as an agent of change—delivering strong business returns and positioning organizations for the challenges and opportunities ahead.

FORCES OF CHANGE → RETURNS ON IMPROVEMENTS

CUSTOMER ACCESS STRATEGY

PROCESS AND TECH SUPPORT

CULTURAL STRENGTH

PROCESS AND TECH SUPPORT → AGENT OF CHANGE
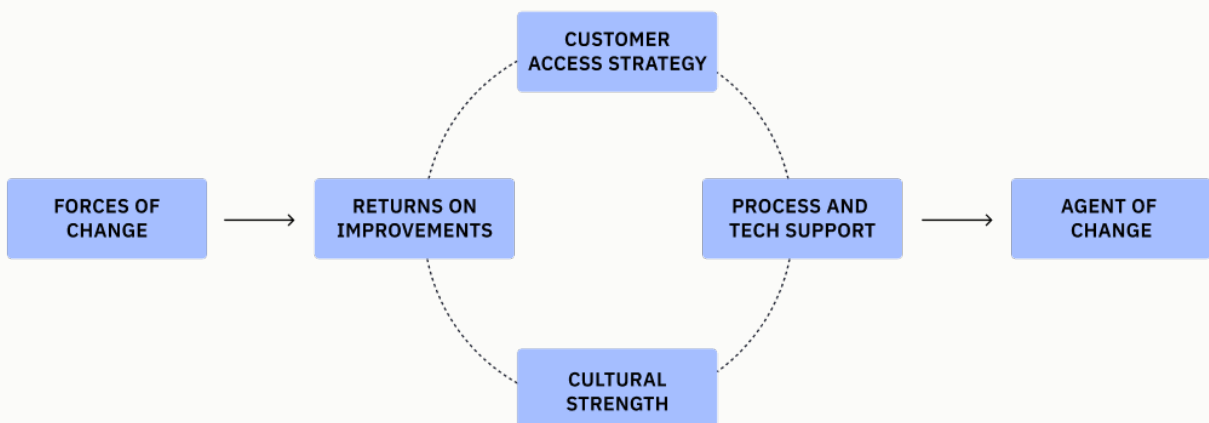
Forces of change

The significant changes taking place in customer services and contact centers can be attributed to four major disruptions. The first three were technology related; the fourth came from fallout that followed the global pandemic.

The internet, thanks to the introduction of browsers in the early 1990s, was widely available and used by organizations and consumers by the end of that decade. Self-service grew rapidly, as did easy access to product and service reviews and new service channels (e.g., email and online communities where customers help each other).

The introductions of the iPhone in 2007 and Android in 2008 were followed by the rapid proliferation and widespread adoption of smartphones. These devices enabled unprecedented connectivity and mobility, fueled the rise of social media, ushered in new business models (e.g., gig-based services such as Uber), and brought new contact channels (e.g., text, chat, social media).

The decade leading to 2020 saw the rise and widespread use of cloud-based services, along with fast-developing AI-based innovations. Through subscription-based services, any organization could access the latest technologies. Service leaders upped the ante, putting pressure on all organizations to improve services to meet evolving customer expectations.

The global health pandemic—which reached the broader world in March 2020—proved to be an inflection point, forcing rapid and dramatic changes on organizations and consumers. Consumer needs and buying habits changed overnight. Organizations scrambled to move support teams to an all-virtual work environment. In most cases, workloads grew and became more complex just as the "great resignation" made finding and keeping the right employees difficult.

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In combination, these disruptions have led to the pressing realities now facing most organizations. Among them:

- Customer needs are evolving and changing more quickly than ever, as they face new pressures at home and work. They expect seamless and competent service through any combination of channels.

- Self-service capabilities, along with efforts to prevent unnecessary interactions, are offloading simple interactions and leaving support teams to handle the highest-value, most challenging, and (in some cases) most emotionally-sensitive work.

- Uncertainties in the economy and supply chain have made accurate forecasting (of workload, staff requirements, and supporting resources) more important and more challenging than in the past.

- The herculean effort made by organizations to adapt to new requirements (e.g., remote work) fueled rapid technology adoption. Now finding themselves at various points of development, many have accelerated their digital transformation plans.

These issues have significantly impacted contact centers. Many are struggling to keep up. And, unfortunately, many managers view today's inaccurate forecasts, resource mismatches, and dissatisfied customers and employees as inevitable until things get back to a sense of normal. But normal—if referring to the norms of the past—will never return.

Others view today's circumstances as an unprecedented opportunity. They are asking questions such as, how can WFM help shape rather than just react to workloads? What is our role in engaging employees and creating an environment they want to be part of? What can we do to help position our organization to adapt and thrive, regardless of what happens in the broader economy? They are, in turn, deepening the involvement of WFM in four key areas: shaping the customer access strategy, cultivating process and technology support, building cultural strength, and identifying returns on improvements. The following sections summarize each.

**The top two priorities for customer service leaders in 2022:[1]**

1 — **Business growth**

2 — **Improving operational excellence**

Shaping the customer access strategy

An industry consultant recently described her current project this way: "I'm working with a client that has thousands of contact points. There has been no impetus to provide sufficient control or guidance. Anyone seems to be able to set up a Facebook page, LinkedIn group, or new phone number. Now they are grappling with how to provide service on all those fronts. It is a mess." She continued, "This scenario is far too common."

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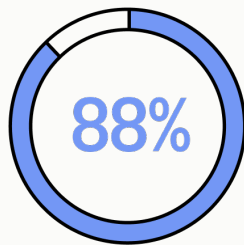
Consumers who say the number-one factor that leads to a great customer service experience is having their issues resolved quickly. (ICMI)

Effective WFM happens long before contacts arrive, even before forecasts and schedules are assembled. WFM can and must be part of developing the organization's strategy for serving customers. That, in turn, impacts the workload, the resources required to handle it, and the level of commitment and support from the broader organization.

In customer service and support, strategy takes the form of a specific plan—a customer access strategy. A customer access strategy is not a customer journey map. Journey maps can be very useful for understanding how customers experience your organization's products and services; they can help inform the decisions you make as you develop your strategy. Your customer access strategy, though, is far more prescriptive and concrete. It's your internal plan—the blueprint that guides the development of your contact center.

As with an organization's overall strategy, a customer access strategy can take many different forms. But effective plans cover, in one way or another, these essential components.[1]

1 Cleveland, Brad. Contact Center Management on Fast Forward: Succeeding in the New Era of Customer Experience. Colorado Springs, ICMI, 2019.

Components of a customer access strategy

Customers
This part of your strategy should summarize how customers are segmented (e.g., by geography, volume of business, level of service purchased, unique requirements, or other characteristics) so that you can shape specific services.

Contact types
This step identifies the major types of interactions that will occur (e.g., inquiries, orders, support).

Access alternatives
This step—where strategy really begins to hit home for contact centers—identifies all the possible communication channels and combinations of channels. (e.g., phone, chat, email, social media, text, video, face-to-face, self-service, customer communities), along with corresponding telephone numbers, web addresses, etc.

Hours of operation
This part of your strategy defines appropriate hours of operation. These can vary for different contact channels or types of interactions.

Service-level and response-time objectives
This step summarizes the organization's service-level objectives (for work that needs to be handled as it occurs) and response-time objectives (for work that can be deferred).

Routing methodology
This part of the plan covers how—by customer, type of interaction, and access channel—each contact is going to be routed and distributed. While these terms have inbound connotations, this also applies to outbound. For example, when the organization originates the contact, through which agent group will the contact be made?

People/technology resources required
This step transitions from "getting the contact to the right place at the right time" to "doing the right things." Which agents or systems will be required for each customer segment and contact type?

Information required
What information on customers, products, services, and policies will need to be accessible to agents and customers? What information should be captured during interactions?

Analysis/improvement
This step defines how the information captured or created during contacts will be used to better understand customers and to improve products, services, and processes.

Guidelines for deploying new services

Finally, your plan should outline a framework for deploying new services, including technology architecture (corporate standards and technology migration plans) and investment guidelines (priorities for operational and capital expenditures).

Developing a customer access strategy requires a cross-functional approach. For example, marketing will determine customer segmentation, IT will weigh into the use of channels, and the contact center director will sign off on service-level objectives. But the deep involvement of WFM in each step is essential to answering many of the most important questions. For example:

- How should the contact center be organized (e.g., how should agent groups be structured)?

- As you add or improve integration of an access channel, what is the impact on staffing, related resources, and redistribution of work across other channels?

- What kinds of skills and knowledge will your agents, supervisors, and managers need? How will hiring and training need to support these requirements?

- How will changes to any part of the plan impact forecasts? Schedules? Resources required outside the contact center (e.g., IT support)?

Our research and experience finds that a minority of organizations have well-developed, up-to-date customer access strategies. And few organizations employ the proactive involvement of WFM in developing and maintaining plans. As you do, you'll be among the few and the best.

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For those who are proactive, the payoffs are significant. From a customer's perspective, a good strategy will enable simplified access, more consistent services, and a high degree of convenience. From the organization's perspective, the benefits translate into better decisions, services that are more effective and efficient, and a dependable framework to guide developments.

Staffing timeline
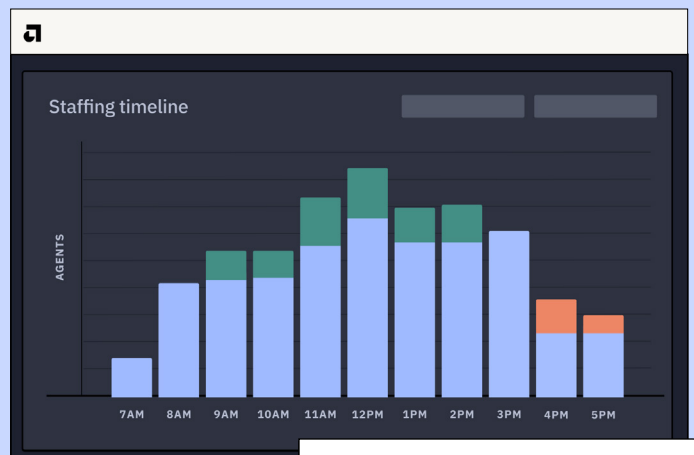
WFM tools with built-in scenario planning help managers simulate staffing plans and confidently set a schedule that's optimal for meeting service-level agreements.

Cultivating process and technology support

A company that develops highly rated software packages for businesses was grappling with direction in their support center. For example, their director was concerned that average handling time (AHT) varied widely among employees. Most had AHTs of 10 to 12 minutes. One support representative had an AHT of over 20 minutes. "Should I set a limit?" she wondered.

The rep in question had printed emails from customers tacked to his cubicle walls. "Thanks so much for the awesome service!" "You helped us get unstuck—and then some!" It was clear he enjoyed delivering outstanding service. His peers weren't so enthusiastic. As one whispered, "He's a bit of a braggart. I handle twice as many support issues."

Their director put a small team together to flowchart their support interactions step by step. What specifically were they doing differently from one person to the next? They concluded that he was going beyond technical support and providing, essentially, personalized training. More importantly, it became clear that all customers would benefit from the insight he was providing.

This discovery led them to establish cross-department initiatives that included:

- Product improvements

- Improvements to user guides and online resources

- Marketing initiatives that better described benefits

- The launch and facilitation of a customer community that enabled customers to help each other

+1,600%

How much a portfolio of the world's simplest brands has beaten the average global stock index from 2009 to 2022. (Siegel+Gale)

This direction proved to be a huge success. Support reps enjoyed lending some hours each month to these working groups. The AHT for everyone fell into a 10 to 12 minute range. The employee who once had the long handling time was involved in developing online videos and references for customers—and was loving it. "We're working on things that help all of our customers, not just those who contact us for support!" he said. Unfortunately, there are many cases where he would have been coached to bring AHT down, and where the organization would have missed a significant opportunity to boost the value of service.

LEVEL 3

Strategic value

LEVEL 2

Customer satisfaction and loyalty

LEVEL 1

Efficiency

Contact centers have the potential to create value on three levels: efficiency, customer loyalty, and strategic value. Strategic value is cross-functional and where the most significant returns are. The contact center, if leveraged, can be a powerful source of insight (from customers, employees, and operational data), enabling the broader organization to improve products, services, and the overall customer experience.

Some organizations believe they've addressed this opportunity solely through quality improvement efforts (e.g., six sigma-trained teams who work on processes). Yet, they can be so focused on reducing variability that they miss seeing opportunities for strategic value. Maximizing potential is a matter of whether and how this insight is used.

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As with developing a customer access strategy, the involvement of WFM is essential. The WFM team can provide insight into variables such as:

- The drivers of work

- The distribution of work across channels

- Variance on handling times

- How patterns are shifting

With the help of WFM, the best customer support centers go beyond customer service. That's the ticket to the big game, where they're directly involved in product and service innovation. Given the forces of change, this is an opportunity that must be fully leveraged.

Building cultural strength

A respected healthcare system set up a resource center that patients could access 24/7 without the need to go to a physical facility. They incorporated the latest thinking and tools in telemedicine and staffed the center with doctors, nurses, and physician assistants. All were very advanced—other than the workflow and schedules, which were a mess. Few felt the need to adhere to what they saw as overly rigid schedules. The result was workload mismatches, missed appointments, and frustrated patients.

A leadership approach that empowers instead of controls is like day and night.

They convened a workshop to make a case for better schedule adherence. At the start of the meeting, there were folded arms and scowls around the room. As the conversation began, one person summed up the perspective of employees: "They [referring to company leadership] seem to think we're some kind of assembly line. 'Start here, stop there. Take a break at 10:15.' We are professionals, not robots."

All agreed, however, that patients deserved better service. With that backdrop, they got out flip charts and began capturing ideas. A central idea began to emerge—the importance of being available when needed. The real turning point came when a nurse near the back of the room stood up. She asked, how many had worked in the ER (the emergency department)? Every hand went up. How many know how to triage? Laughter ensued (any medical professional has triage built into their thinking), with every hand up.

"Look," she reasoned, "every day, we're all making time-driven decisions in operating rooms and on hospital floors... not for our own comfort or convenience, but because that's when our patients and these situations need us, and when we need each other."

Her point helped to change the mindset. Schedules do matter. Today, that organization is exemplary in its focus on customers, including a strong respect for workflow and schedules. Everyone has bought in and is a part of the same time-driven approach.

Many knowledge-economy employees say that the lack of agency is a major source of dissatisfaction at work—meaning lack of control over decisions, time, and output. This is particularly true in contact centers. Many of the employees who leave say the job isn't a fit. These are some of their exact words, from exit interviews:

"You're told when and how to go in and out of this or that work mode."

"You're handed schedules that dictate your day down to the minute."

"Your supervisor's monitor flashes red when you get stuck handling an interaction."

"Your schedule changes at any time, especially canceling meetings, because the forecast is off."

+10%

The pay increase required as the tradeoff to more flexible working hours (Randstad Workplace 2025 Report).

Building cultural strength is an area where WFM can and must deliver. The right approach is key, and it involves seven essential steps:

1. Show employees projections for customers and workloads; explain what they mean.

2. Be transparent with staffing and schedules; invite employees into the process of producing them.

3. Explain and show the power of one (i.e., the impact of each person). Using a table such as the one in the first section can help.

4. Provide employees with a high degree of input and autonomy over the work they are doing.

5. Encourage the automation of rote processes where possible (e.g., data capture). Enable employees to focus on customers.

6. Provide easy-to-understand and up-to-date information on workloads, queues, and staffing levels to employees and their supervisors; enable ground-up (versus top-down) adjustments.

7. Above all, reinforce the impact each person has on customers, colleagues, and strategic value. This message is far different than control: We need you!

Contact centers have to get the right people in place at the right times. That is central to what they do—being available with the right expertise as needed. But a leadership approach that empowers instead of controls is like day and night.
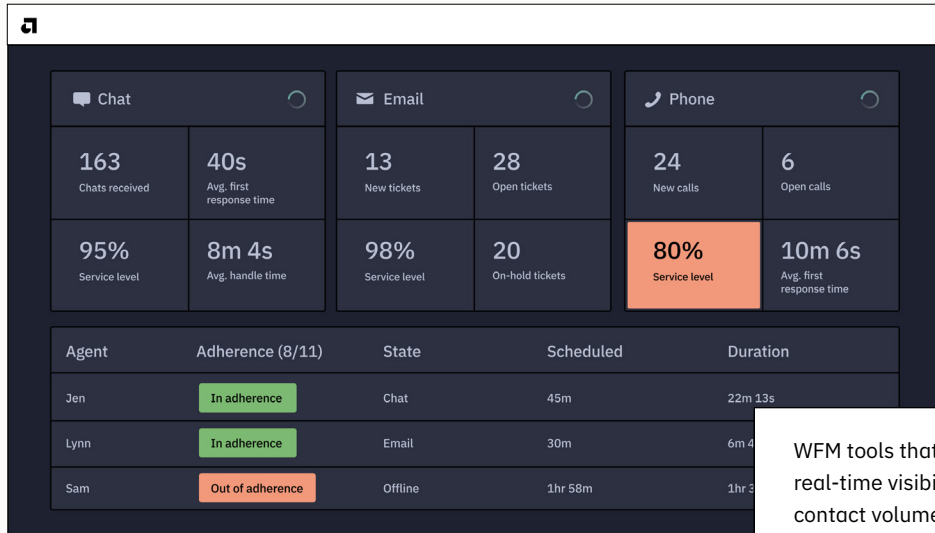
WFM tools that provide real-time visibility into contact volumes and agent adherence power data-driven decision-making that ensures service-level agreements are met.

Identifying returns on improvements

A food company once distributed a product in Europe that was tainted and making people sick. The problem began at the start of a weekend, and customer inquiries to the company went unanswered because the customer service department was closed. The problem quickly escalated through the weekend and was, by Monday, a full-blown crisis.

In an investigation that followed, the company discovered they had data (call attempts and patterns) that should have justified weekend hours, even in the absence of a crisis. They further estimated that the direct legal costs, payouts, and damage to their brand could have funded weekend hours in customer service for over 100 years.

Organizations that are leading the pack in financial analysis build toolkits with two categories of considerations: returns on improvements and costs of inaction. You'll want to consider both when making decisions on whether and where to make improvements.

| RETURNS ON IMPROVEMENTS	COSTS OF INACTION
- Customer loyalty	- Customer defection
- Brand promotion	- Brand damage
- Operational improvements	- Recurring problems
- Product and services innovation	- Compliance, safety, legal
- Employee engagement	- Employee dissatisfaction

The five potential benefits of making improvements to customer service include:

1. **Customer loyalty**
Loyal customers stay longer, spend more over time, and cost far less than the expense of winning new customers.

2. **Brand promotion**
Also called word of mouth. The better the customer experience, the more likely you are to create customers who are brand advocates that promote your products and services through referrals and positive reviews.

3. **Operational improvements**
Improvements often positively impact operations—inventory, shipping, customer service, technical support, or others. These processes become more scalable and cost effective.

4. **Product and service innovation**
Better products and services lead to more revenue, tend to cost less to support, and boost trust in your brand.

5. **Employee engagement**
Improvements to customer experience almost always boost employee engagement (and vice versa), leading to better attendance, retention, and productivity.

Five potential costs of inaction if you don't make improvements to customer service include:

1. **Customer defection**
All the investment to earn the trust and business of those customers walks right out the door.

2. **Brand damage**
Customers who speak poorly about your products and services drive away business and create negative perceptions that are hard to overcome.

3. **Recurring problems**
Product glitches and faulty services—even if small—cost enormous time and money as you fix the same problems over and over.

4. **Compliance, saftey, and legal costs**
In most every industry, there have been heartbreaking cases in which defective products or insufficient services caused harm. Even if it's very unlikely, consider the potential for: fines, lawsuits, brand damage, and even bankruptcy.

5. **Employee dissatisfaction**
Many organizations are unaware of the extent to which poor customer experience contributes to employee dissatisfaction. Good employees will eventually leave. Apathetic employees may stay, but they likely won't provide the contribution your organization and customers need.

Giving visibility into workloads, WFM has to be part of making the case for improvements to customer support. In a simple example, a consumer products company analyzed their contacts by type and discovered that 11% of the contacts on a cleaning product were due to the child-proof cap damaging the spray nozzle. The WFM team was able to quantify the cost impact of this workload and, in collaboration with marketing, make estimates on the impact of the problem to the larger customer base (most of whom didn't contact them) and the brand. They then coordinated with a product team and their packaging supplier to redesign the cap.

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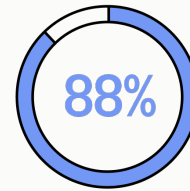
Consumers who say that the experience a company provides is as important as its product or services. [1]

Of course, others who are part of budgeting and investment decisions will be involved in identifying and assessing returns or costs. This is a collaborative effort. But WFM is closest to trends in workload, resources, and evolving customer needs—key variables in identifying and prioritizing improvement opportunities.

Agent of change

This is an exciting season of development in WFM. Some are simply reacting to the forces of change—doing the best they can. Others are leading the way into a new era where WFM has a strategic role in enabling the organization to maximize value and returns. By doing so, they are not only responding to the forces of change—they are harnessing the potential of WFM to become an agent of change.

About the author

Brad Cleveland is known globally for his expertise in customer experience, customer service, and leadership. He has worked across 45 states and in 60 countries for clients as diverse as American Express, Apple, USAA, the University of California, and the federal governments of the U.S., Canada, and Australia.

He has appeared in the New York Times, Financial Times, Wall Street Journal, Inc. Magazine, Washington Post, NPR's All Things Considered, and others. Brad's books include Leading the Customer Experience: How to Chart a Course and Deliver Outstanding Results (1st edition, 2021), Contact Center Management on Fast Forward: Succeeding in the New Era of Customer Experience (4th edition, 2019), and others. Leading the Customer Experience was selected as a NYC Big Book Award distinguished favorite.

Brad is also a presenter of popular LinkedIn Learning courses on customer experience and customer service. His courses have reached close to one million views, and his books, articles, and courses have been translated into a dozen languages. He was founding partner in and former CEO of the International Customer Management Institute (ICMI), where he remains an advisor. Today, he is a sought-after speaker and consultant.

Assembled

Assembled is a workforce management platform that gives modern support teams more accuracy in staffing, more ease and control in schedule creation, and better visibility into the data that helps them improve performance and advocate for themselves. Today, our solution helps customer-centric brands craft world-class customer experiences.

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