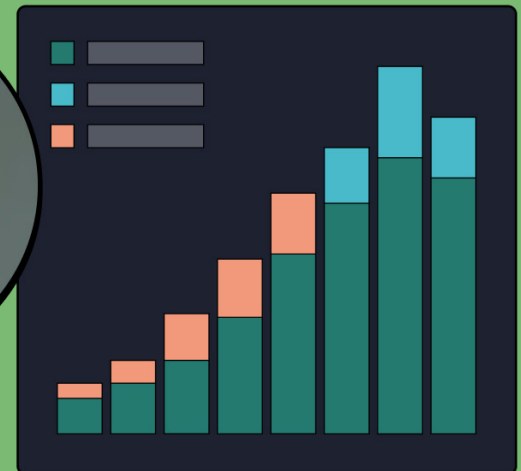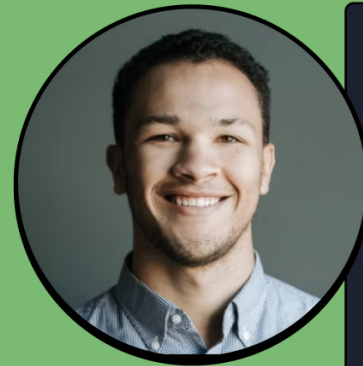# Assembled

Rethink Customer Support Ops

The data-driven support leader's guide to workforce optimization

Managing a customer support operation has never been an easy job, but it's also never been more complicated than it is now. Today's support teams must navigate flexible work arrangements, an increase in customer contacts (from customers with much higher expectations, mind you), and more support channels to staff and monitor. And if that wasn't enough, ongoing economic worries continue to put pressure on support teams to do more with less while staggering rates of attrition continue to undermine efforts to meet service-level agreements.

In short, it's tough out there for support teams right now.

To compete in the new era of customer support, contact center leaders must build resilient support operations that can quickly adapt to whatever comes next—using workforce optimization (WFO) strategies to maximize resources and keep employees engaged.

This requires significant investment in two critical areas:

1 Flexible workforce management software that helps support teams optimize existing resources

2 A culture of employee engagement that is ripe with opportunities for training and professional development. Without the right tools, people, and culture in place, support teams will struggle to maintain a level of service that today's customers have come to expect.

In this ebook, we outline how and why the contact center has evolved, what that means for support agents, and everything you need to know to lay the foundation for your own WFO efforts.

The role of the contact center (and support agent!) is changing

Support is on the front lines of your brand, with support agents engaging with customers more than any other department. But the contact center of today looks a lot different than it did even just a few years ago.

Customer interactions in this new support environment have become increasingly complex. Agents must now track customer queries from one channel to another. Self-service has all but eliminated low-complexity tickets.

Taken together, these shifts have drastically altered a day in the life of a support agent. And with a growing emphasis on good support experiences as a competitive differentiator, the pressure's on support agents to keep customers happy—and to keep them from taking up with your competitors.

With their depth of product knowledge and proximity to how customers are engaging with your brand, support teams are uniquely positioned to shed light on how product and service offerings could be improved.

But here's the thing: None of this matters if your contact center is constantly reacting to changing circumstances as they arise. If your employees are overburdened and under-resourced, you'll never win the loyalty of your customers.

And that's where WFO comes in.

WFM 2.0: From WFM to WFO

Like most things, workforce optimization is a process. Before you can level up to workforce optimization, you need a sound workforce management strategy and the right tools in place.

Of course, it would be shortsighted to think of workforce optimization as a box you simply check and move on from. The entire point of workforce optimization is that there's always room for improvement. And two years from now, workforce optimization for your support operation could look drastically different than it does today—particularly if your future plans include expanding support to new locations, increasing hours of operation, and hiring significantly more agents (whether in-house or through business process outsourcing).

Workforce management vs. workforce optimization: What's the difference?

These terms probably seem more or less the same—and it's true that some organizations use them interchangeably. But there are a few very important distinctions that are worth noting.

✧ **Workforce management (WFM)**

Refers to implementing the processes and systems that ensure you have the right people in the right place at the right time. When done correctly, WFM ensures you have just enough agents staffed to respond to customers and still meet your targets.

✧ **Workforce optimization (WFO)**

Allows organizations to more swiftly adapt to changes (such as shifts in the labor market), reduce costs, drive efficiency, and improve the customer experience. According to the International Customer Management Institute (ICMI), it's a strategy that encompasses WFM, quality assurance, and performance management, but it can really extend beyond that to incorporate any practices that help to future-proof your support team.

With these definitions in mind, you can see that WFO really builds off of WFM to take your support operations to the next level. You might even think of it as WFM 2.0.

How to evolve from workforce management to workforce optimization

Now that you know more about WFO and why it's so beneficial, you're probably wondering how you can get your support team to that level—along with meeting all the other goals on your list. You need to implement the right people, processes, and tools. While it can seem daunting at first, it's helpful to think of achieving WFO as a two-phased approach.

Phase 1: Establish your workforce management foundation

The first phase is all about ensuring you have a strong WFM foundation, which involves time tracking, scheduling, forecasting, and analytics. Having one centralized WFM system that connects each of these four components is critical. Why? Because as the Society of Workforce Planning Professionals (SWPP) points out, you can otherwise end up with siloed information that leads to numerous problems, such as:

- Lack of visibility into other departments' initiatives
- Inability to quickly access relevant information
- Need to switch back and forth between different systems

Now, let's explore how to improve each of these WFM fundamentals to continue on your path toward WFO.

Streamline agent time tracking

At best, time tracking feels like a nuisance for agents. At worst, it feels as though they're under surveillance. While time tracking is essential

for understanding how agents are spending their time throughout the day, many of the systems support teams use don't provide a true picture of the activities agents are actually performing.

This is particularly true for agents who are providing email support—they can easily appear to be out of adherence if they need to navigate away from the customer's email to a different screen in order to find the information they need to answer a question.

Luckily, the best WFM platforms include sophisticated time-tracking capabilities that go beyond the binary "online" or "offline" statuses. The result is that everyone gains greater visibility into how agents are actually spending their time at a granular level.

Simplify scheduling

If your go-to method for building out schedules is updating the same spreadsheet you've been using for years, you're in good company. You might even find that it still works relatively well. But if your team is growing, you're bound to reach a breaking point sooner or later.

The time to improve your scheduling process is now. You don't even have to take our word for it—a survey from the SWPP shows that one of the most important measures of WFM success is related to scheduling efficiency and accuracy.

Leveraging WFM software will save you an immense amount of time and frustration because it allows you to leverage automations to build schedules at scale while accounting for lunch breaks, meetings, and more. WFM platforms also make it far easier to adjust the schedule in the event of a sick day or last-minute PTO request. No more deleting and starting from scratch—just make a few quick changes and the tool will take care of the rest.

Fine-tune forecast accuracy

Generating accurate forecasts is a pretty crucial part of WFM (and WFO). You need an accurate estimate of volume to determine your future staffing needs. The more accurate your forecast, the more cost-effective your team will be.

To get started, you simply have to make some educated guesses about your expected volume for a given time period. Then, you can compare the actual volume to determine your forecast accuracy, and adjust accordingly.

The SWPP survey noted that forecast accuracy is a critical measure of WFM success—and not just by day, but even smaller increments. That can start to become overwhelming if you're manually pulling numbers and inputting them into spreadsheets, so it's a huge help to leverage a WFM platform. It speeds up the process and also leaves you with more accurate forecasts to further home in on your staffing needs.

Request a demo to see how a WFM platform such as Assembled can help you forecast with confidence.
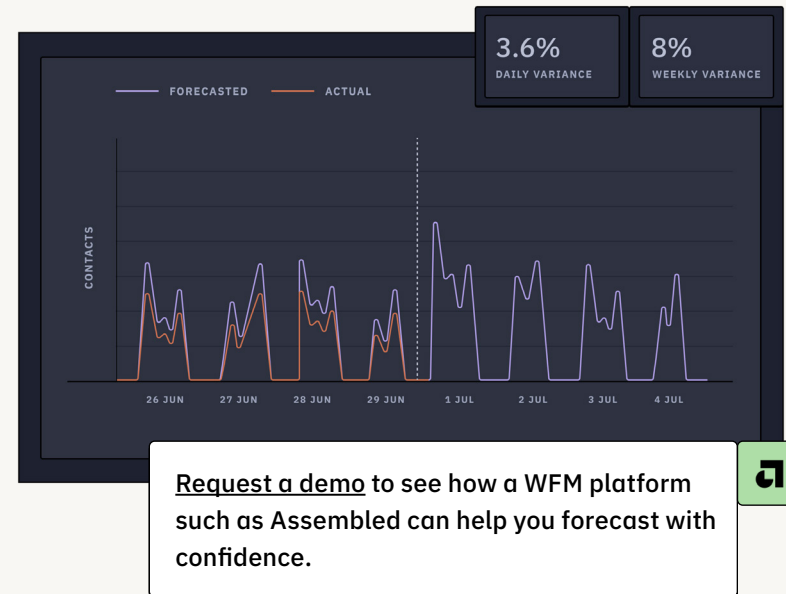
Make better decisions based on analytics

Keeping tabs on performance data is standard for anyone in a customer support leadership role. Reviewing customer service metrics helps you to understand not only how well your team is performing, but also where there's room for improvement.

When it comes to underline tracking metrics, consistency is key for ensuring you're able to quickly identify fluctuations and determine whether you need to take action. That said, timeliness is just as critical. Finding out on Thursday that your agents were struggling to meet service levels on Wednesday leaves you with few options to adjust.

This is where real-time analytics come in handy. Real-time analytics allow you to see what's happening as it's happening. For example, if you're seeing that multiple agents are falling behind their targets, you can reach out to an on-call agent to provide some temporary support.

Phase 2: Take the final steps toward workforce optimization

Only after you've fine-tuned your WFM processes and systems can you move on to taking the final steps toward WFO. We mentioned earlier that performance management is a key component of WFO. But if you don't yet have robust analytics tools that enable you to identify opportunities for improvement, how will you know what type of coaching agents need? Once you have a firm WFM foundation, you can move on to these final steps toward WFO.

Establish a QA program

As the ICMI noted, having solid quality assurance (QA) practices is an important part of WFO. It allows you to evaluate agents' performance,

assign them a score, and compare everyone on a level playing field. You can build a QA program however it works best for you, but Scorbeuddy suggests the following steps:

- Define goals

- Determine KPIs

- Outline policies and procedures

- Implement the program

- Measure results and feedback

- Update as needed

Be particularly careful when it comes to identifying the right KPIs. According to Zendesk's CX Trends 2022 report, 86% of agents are unsatisfied with the metrics used to measure their performance. What this means is that you should incorporate metrics that speak to the quality of interactions rather than focusing solely on efficiency.

It's also worth considering whether you need additional software to support this function. There are many QA tools out there, but make sure to do your research first. You don't want to end up purchasing a tool that doesn't integrate with your WFM platform.

Prioritize performance management and career development

With agent performance metrics in hand, you're now ready to focus on providing the coaching agents need to get even better at what they do. For example, let's say one of your agents has an unusually high abandon rate for live chat. They likely need some guidance on how to craft messages that feel friendlier and more personal to customers.

Believe it or not, quality instruction is something agents are craving more of. Zendesk's CX Trends 2022 report shows that only 20% of agents are satisfied with the quality of the training they receive. It also indicates they want more career advancement opportunities.

When it comes to establishing coaching and career development programs, you have a number of options. Depending on the customer support software you use, there may already be some training available to your team. Both Zendesk and Intercom offer courses to help agents and managers hone their skills. You might even make the case to leadership about the need to build out an internal professional development team with experts who can provide coaching and career development opportunities on a regular basis.

Looks like you got stuck on a few tickets this week. I've got some ideas for next time.

Sounds good!

Avg. adherence	92%
Avg. handle time	6min.
QA Score	82

Request a demo to see how Assembled analytics give you maximum visibility into team performance, productivity, and staffing accuracy.

Identify the ideal makeup of your workforce

The final step in your WFO journey is reaching the point where you can go beyond merely anticipating future hiring needs to identify exactly when you'll need new team members and what their specializations should be. How? Your forecasts, data analysis, and QA programs together can help you recognize skill gaps that need to be filled.

Maybe you need to hire more agents who are skilled in navigating complex phone conversations to address increasing volumes on that specific channel. Or perhaps you're in need of another support manager who can dedicate more time to onboarding new employees.

Pinpointing your hiring needs is important because it's incredibly frustrating for employees to accept a position only to find out their day-to-day responsibilities are vastly different than what was initially communicated. This doesn't do much to encourage retention, which can be a huge issue for both the support team and the larger organization. In fact, a McKinsey & Company report shows that the cost of attrition is anywhere between $10,000 and $21,000 per employee.

Knowing exactly who it is you're looking for when the hiring process begins will save you time and money in the long run. And happier, more satisfied agents? That's just icing on the cake.

WFO is a win for everybody

Today's support teams won't survive if they're still relying on yesterday's playbook. We've seen how these past few years have fundamentally altered the way we work and the way we consume. We've watched the call center bullpens of yesteryear fade into irrelevance, with remote, omnichannel, 24x7 support operations rapidly moving to take their place.

A new era of customer support calls for an entire reimagining of your support operations. And in this new era, WFO isn't just a nice to have—it's essential to maximizing existing resources and retaining internal talent while upleveling the quality of customer support. That's what we call a win-win-win for support leaders, support agents, and customers.
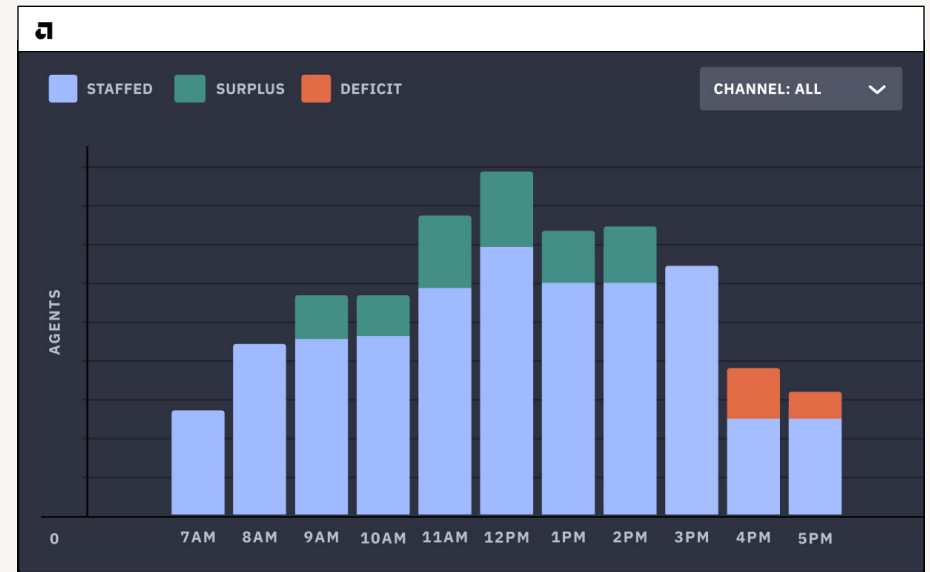
Effective WFM is key to maximizing your support team's resources. Request a demo of Assembled today.