ICMI

The State of Workforce Management

A Contact Center Research Executive Summary

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Introduction

ICMI last studied contact center workforce management (WFM) trends and benchmarks in 2012. In the five years since that study, the channels utilized by contact centers evolved, the places in which contacts are handled diversified, and the approaches necessary for effectively forecasting and planning changed. As the authority on contact center excellence, ICMI sought to understand better the WFM techniques, technologies, and best practices utilized in today's contact center environments. A new study, conducted in Q1 2017 and underwritten by NICE, enabled us to take an updated look at modern WFM practices, challenges, and future plans.

"We had a fundamental belief that doing it right the first time was going to be easier than having to go back and fix it. And I cannot say strongly enough that the repercussions of that attitude are staggering. I've seen them again and again throughout my business life."

— Steve Jobs

In the contact center world, if it's not right the first time, there isn't a chance to go back and do it all over again. This isn't to say that service recovery isn't effective, but it's certainly not guaranteed to work, and it absolutely requires us to exert more effort and energy than we would if we got it right from the beginning. At the most fundamental level for the contact center, this means having the right number of properly skilled people and supporting resources in the right place, at the right time, to handle an accurately forecasted workload at service level and with quality. It's the WFM process that sets the foundations for whether or not a contact center gets it right the first time. Workforce management is absolutely critical to an organization's success.

This study revealed that there is positive movement within WFM, with organizations recognizing the need for new technologies, evolved processes, and improved outcomes. It also uncovered that workforce management remains an incredibly manual, time-consuming task that is inconsistently applied across channel types. This lackadaisical approach to planning is incredibly concerning at a time when contacts are moving from the phone to new channels at exponentially increasing rates. If organizations truly want to achieve strong financial performance, customer satisfaction, and employee engagement, it will be mission-critical to apply WFM best practices across their operations, embrace and adopt enabling technologies, and seek automation where possible.

Key Findings:

- Guaranteed system uptime is the most important benefit of moving WFM to the cloud
- 20% of contact centers don't measure forecast accuracy
- Only one-quarter of contact centers collaborate with the frontline on scheduling methodology
- 73% of contact centers don't use a WFM solution for scheduling back-office activities
- 51% of contact centers have a dedicated workforce manager or team that's in charge of scheduling
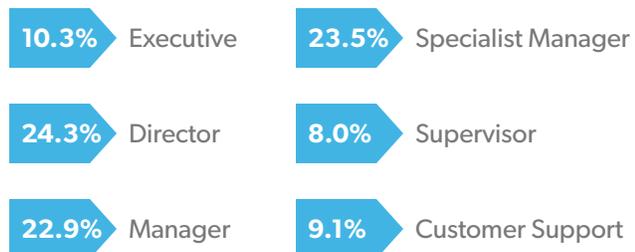- 71% contact centers that conduct intraday forecasting do so manually

Demographics

The 362 respondents to this survey offer a diverse sampling of contact center industries and sizes. The largest industries represented were Banking/Insurance (24.8%) and Healthcare (12.1%). Of the total respondents, 106 respondents had retail locations. Respondents' roles within their contact centers varied, however, the majority were senior management (24.3%), specialist management (23.5%), or mid-level management (22.9%). The size of the responding contact centers also varied. For the purposes of this study, there are three size groupings: fewer than 50 agents (22.1%), 50-500 agents (39.2%), and 500 agents or more (38.3%).

Of the respondents surveyed about half (51.2%) reported that a workforce manager or team is primarily in charge of scheduling for their contact centers. Additionally, just under half of the respondents (49.2%) indicated that scheduling is the primary responsibility of a contact center manager or supervisor. However, when examining the role of scheduling and accounting for the size of the respondent's contact center, it was found that size may determine who is responsible for scheduling. While the groupings of 50-500 and 500 or more agents reported more than half of respondents having a dedicated workforce manager or team, the grouping of fewer than 50 agents reported only 16.9 percent having a dedicated workforce manager or team. Additionally, for this group, 70.8 percent of the scheduling responsibilities landed with a contact center manager or supervisor.

TOP 5 REPRESENTED INDUSTRIES

1. Financial/Legal Services
2. Healthcare Provider
3. Communications
4. Retail/Sales/Ecommerce
5. Government

POSITION IN THE CONTACT CENTER

10.3%	Executive	23.5%	Specialist Manager
24.3%	Director	8.0%	Supervisor
22.9%	Manager	9.1%	Customer Support

AREA OF RESPONSIBILITY

Customer Service: **78%**   Technical Support: **39%**   Sales: **30%**

WHO'S IN CHARGE OF CONTACT CENTER SCHEDULING?

51.2%	25.1%	17.5%	2.1%
A WFM Team	A Contact Center Manager	A Contact Center Supervisor	A Third-Party Provider
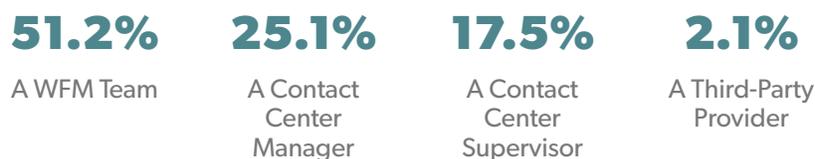
The Reality of Workforce Management in Today's Contact Centers

According to survey respondents, individuals feel as though WFM is oftentimes the defining factor when determining how their bus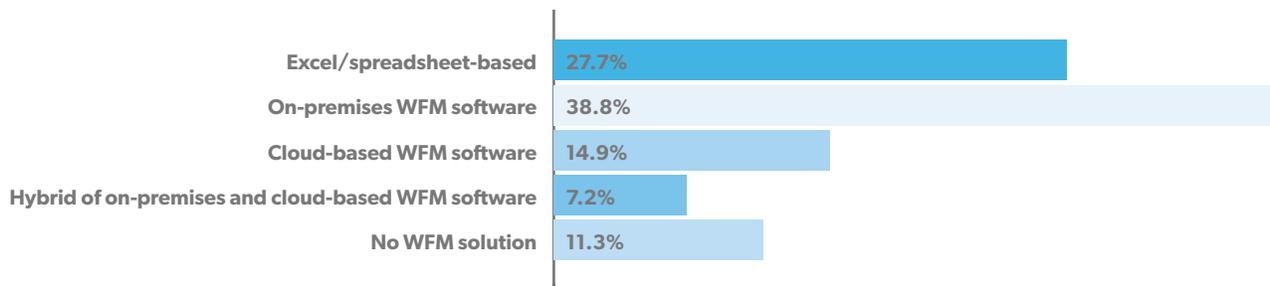iness is going to perform. One respondent stated, "We're a small center, so workforce management is the key to our success!" Another respondent indicated, "***Since we implemented a strong workforce management discipline within our contact center three years ago, we have taken our service level from 20 percent to consistently averaging 90 percent for the past two years.***" While its importance is undeniable, the real question is the effectiveness of today's style of WFM.

Knowing who's in charge of keeping up with workforce responsibilities provides a small glimpse into the "who, what, where, when, why, and how" of WFM in today's contact centers. The next question—the "what" question—looks into the type of solution these contact centers are using to manage their workforce needs. Once the types of solutions are determined it will be important to understand the "where and when" questions, or how often they utilize their existing WFM solution.

The majority of contact centers (39.1%) report utilizing an on-premises software, followed by 28.1 percent of respondents using an Excel/spreadsheet based solution, and 14.9 percent using a cloud-based solution. Of the total respondents, 10.2 percent reported not using any WFM solution.

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CURRENT WFM SOLUTION?

Excel/spreadsheet-based	27.7%
On-premises WFM software	38.8%
Cloud-based WFM software	14.9%
Hybrid of on-premises and cloud-based WFM software	7.2%
No WFM solution	11.3%

Considering the effect of size on the type of WFM solution in use, it was again shown that size is a contributing factor to the structure of WFM in the contact center. When a contact center has fewer than 50 agents, 36.3 percent of respondents reported their WFM solution to be Excel/spreadsheet-based, and another 36.3 percent of those respondents indicated that their contact center doesn't use a WFM solution at all. Regardless of contact center size, for all categories except fewer than 50, the majority of respondents reported utilizing an on-premises software.

As shown, the primary solutions for WFM in today's contact centers are Excel/spreadsheet-based or on-premises software. This begs the question, how frequently are the individual's in charge of managing the workforce schedules having to utilize these solutions? Respondents were asked to identify how frequently they utilize their solution for schedule revisions and sift bids and the majority answered once per quarter (22.3%), followed by once per month (16.4%). However, 14.2 percent of respondents report utilizing their solution once per week, and an additional 14.7 percent ranked their utilization at more than once per week.

IN YOUR CONTACT CENTER(S), WHAT IS THE FREQUENCY OF SCHEDULE REVISIONS AND SHIFT BIDS?

More than once per week	14.7%
Once per week	14.2%
Once per month	16.4%
Once per quarter	22.3%
Once per year	7.6%
Never	7.8%
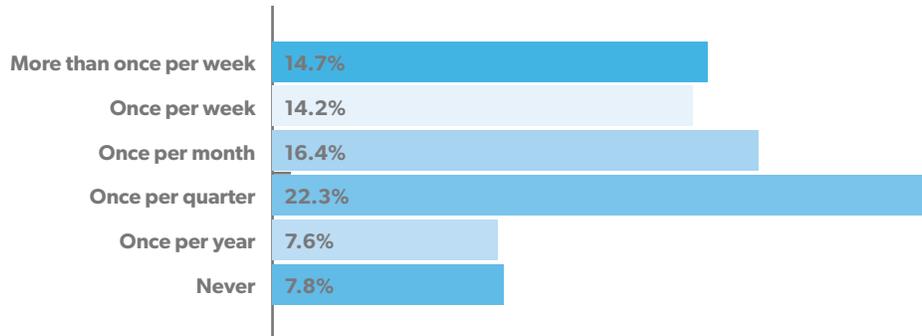
It's important to understand the difference in utilization based on the types of WFM solutions contact centers are using. If the type of solution that a contact center is using increases the amount of work that needs to be completed, there may be a potential benefit to moving to a solution that could allow for more automation. Thirty-one percent of respondents whose contact centers use Excel/spreadsheet-based solutions report never using the solution for schedule revisions or shift bids, and an additional 46.4 percent only use the solution once per year. However, 33.3 percent indicated accessing the solution once per month, 34.0 percent utilized the solution once per week and an additional 22.8 percent are using the solution more than once per week, for schedule revisions or shift bids. **This means that, in total, 56.8 percent of Excel/spreadsheet-based respondents are having to access their solution for schedule revisions or shift bids once per week or more.** If the respondents are having to access the solution more frequently, this may be increasing the amount of manual labor required due to workforce management.

HOW FREQUENTLY DO CONTACT CENTERS USING SPREADSHEETS AS THEIR WFM TOOL MAKE SCHEDULE REVISIONS?

More than once per week	22.8%
Once per week	34.0%
Once per month	33.3%
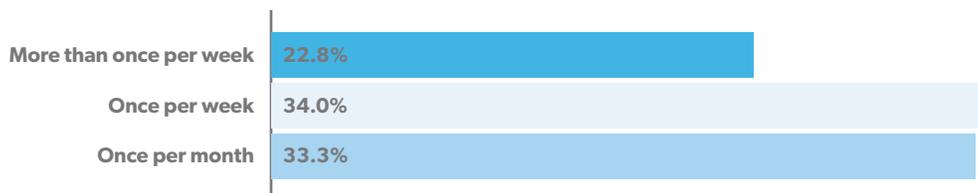
When judging the actual manual labor of WFM requires, it's important to understand the larger picture. We have answered the "who, the what, the where, and the when." Now we need to understand "how and why" the individuals responsible for WFM are utilizing their solutions.

The Challenges of Workforce Management

When asked about agent scheduling, one respondent indicated that his contact center has "a very manual process where people ask for schedule changes and [those changes] are granted based on business need, tenure, and performance by a benevolent but overworked manager. We have just deployed a workforce management system and hope to have more system-supported flexible options in the future." This response encapsulates the research findings about respondents' struggles with their current WFM solutions.

    1) There's a large amount of manual labor involved.

    2) The present system, if one is utilized, doesn't allow for agent interaction or engagement.

    3) The present system isn't sufficient for all service channels.
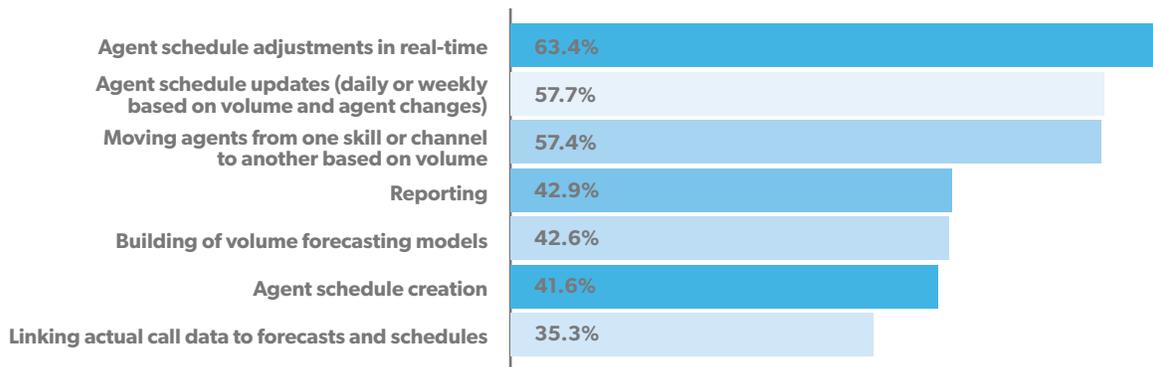
But which of the WFM processes are respondents reporting as manual labor? The research found three areas that increase the amount of manual labor required of the individual(s) overseeing WFM: agent scheduling, intraday changes, and scheduling outside of the contact center, such as at brick-and-mortar locations.

Agent Scheduling:

Previous ICMI research on multichannel forecasting found that real-time management is an important aspect to have a successful workforce: "If there's a trend, quick action needs to be taken to prevent further degradation of service." **However, 63.7 percent of respondents to this study report that real-time adjustments to agent schedules is a manual process. Additionally, 44.0 percent of respondents indicate that moving agents from one skill or channel to another, based on volume, is also a manual process.** This would indicate that to make the adjustments in real-time, based on consumer needs, an individual must go through a manual process for a very time-sensitive event.

Other manual processes for agent scheduling include overall agent schedule updates (63.4%) and linking call data to forecasts and schedules (35.3%). Relying on manual updates may be opening the door to unforeseen events or delaying responsiveness. In either scenario, the impact of manual labor surrounding agent scheduling could lead to overall dissatisfaction on the consumer's end.

WHICH COMPONENTS OF YOUR FORECASTING AND SCHEDULING PROCESS ARE MANUAL?

Component	Percentage
Agent schedule adjustments in real-time	63.4%
Agent schedule updates (daily or weekly based on volume and agent changes)	57.7%
Moving agents from one skill or channel to another based on volume	57.4%
Reporting	42.9%
Building of volume forecasting models	42.6%
Agent schedule creation	41.6%
Linking actual call data to forecasts and schedules	35.3%

Intraday Changes:

In the fast-paced world of customer service, it's not uncommon to see dramatic shifts in volume in a single day. Therefore, it's important for the individual(s) tasked with staffing for random spikes in contact volume to be able to effectively manage these events. **However, this research found that 70.8 percent of all intraday adjustments are handled manually.** Furthermore, 15.3 percent of respondents reported that they don't adjust for intraday events. Therefore, automated systems that would allow for intraday adjustments and forecasting would significantly decrease the amount of manual labor output by the individual(s) responsible for WFM. This magnitude of change would promote better utilization of agents' time and skills while creating a more consumer-focused approach.
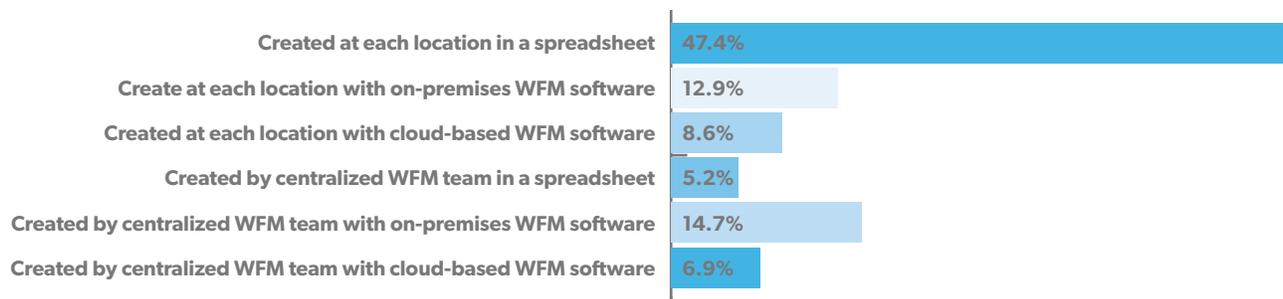
HOW IS INTRADAY WFM HANDLED IN YOUR CONTACT CENTER?

Manually by WFM team, managers, or supervisors	70.8%
Automated through the WFM system	11.4%
Intraday adjustments don't occur in the contact center	15.6%
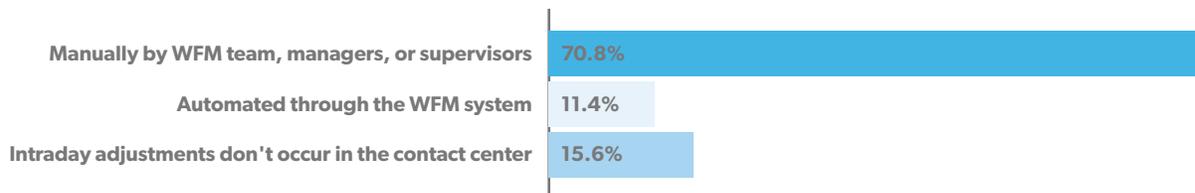
Scheduling at Non-Contact Center Locations:

Thirty-eight percent of respondents reported having brick-and-mortar retail locations (N=106). The majority of these respondents (48.2%) indicated that schedules are created at each location in a spreadsheet. Only 13.6 percent of these respondents have an onsite WFM solution, and only 8.2 percent of brick-and-mortar respondents are utilizing a cloud-based software.

WHAT IS THE SCHEDULING PROCESS IN YOUR BRICK-AND-MORTAR RETAIL LOCATIONS?

|	
Created at each location in a spreadsheet	47.4%
Create at each location with on-premises WFM software	12.9%
Created at each location with cloud-based WFM software	8.6%
Created by centralized WFM team in a spreadsheet	5.2%
Created by centralized WFM team with on-premises WFM software	14.7%
Created by centralized WFM team with cloud-based WFM software	6.9%

One brick-and-mortar respondent even indicated that the WFM software is "only for the contact center." As shown, compared to the contact center usage of WFM software, brick-and-mortar locations aren't being exposed to the software and/or automation of workforce duties. In many cases, it appears as though these types of locations, either non-contact center or smaller staffed areas, aren't reaping the benefits of WFM tools to the same intensity that their larger or contact center-based locations experience. According to one respondent, "*I am interested in effective and low-cost tools for managing a small staff. I oversee both our offshore call center, which has a great workforce management tool, and a small internal staff of five. Scheduling for the small staff is surprisingly complicated, but I'm not sure what low-cost tools would help with that, particularly for back-office scheduling, and expense is a major issue.*"

Bringing to light the gaps created by these manual, time-consuming processes is a step towards understanding the present condition of WFM. Knowing the "who, what, where, when, why, and how" of WFM in today's contact centers allows an insight into a fast-paced workplace that is moving at a less-than-desirable manual speed.

While the individuals tasked with WFM wrestle with their current solutions, or lack thereof, are targeted areas of focus being forgotten? Respondents were asked about the initiatives their organizations are presently pursuing, and the highest ranking initiatives were reducing operating costs (66.7%), delivering improved service at the same or lowered costs (59.0%), improving quality and interaction insights (57.6%), and reducing turnover (48.5%). With these focus areas in mind, the effectiveness of the present WFM tools should be evaluated.

WHAT INITIATIVES IS YOUR ORGANIZATION PURSUING AT THIS TIME?

Initiative	Percentage
Reducing operating costs	66.7%
Delivering improved service at same or lowered costs	59.0%
Improving quality and interaction insights	57.6%
Reducing turnover	48.5%
Reducing energy footprint	16.3%
Reducing total vendor count	11.3%
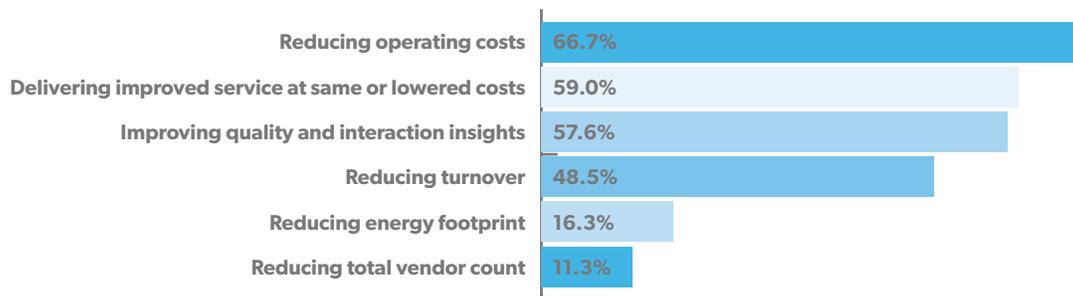
Do Today's Workforce Management Tools Get the Job Done?

WHAT ARE THE TOP THREE SCHEDULING CHALLENGES YOUR CONTACT CENTER FACES?

1 Managing and responding to real-time changes in workload/staff availability **(39%)**

2 Getting agents to regularly adhere to their schedules **(32.6%)**

3 Difficulty managing contact center efficiency versus staff work/life balance **(25.1%)**

As illustrated above, contact centers' top three scheduling challenges revolving around real-time changes, schedule adherence, and managing efficiency versus work/life balance. Followed closely behind the top three challenges were lack of flexible scheduling alternatives to engage agents (22.9%) and ineffective scheduling technology and/or tools (22.4%).

It's interesting that the top-ranked challenge is also one of the top areas found to be manually labor-intensive. The ineffectiveness of present WFM tools, in terms of real-time, call, and agent scheduling, is demonstrating the challenge to meet consumer demands. One respondent indicated, *"Automation of some of the reporting features of our workforce management tool would greatly improve our effectiveness with meeting our customers' needs."* This further ties into the current features of WFM that respondents wish were automated.

OF YOUR MANUAL WFM PROCESSES, WHICH DO YOU WISH WERE AUTOMATED?

42.2% Moving agents from one skill or channel to another based on volume

40.6% Agent schedule adjustments in real-time

36.3% Agent schedule updates (daily or weekly based on volume and agent changes)

Moving agents from one skill or channel to another based on volumes was indicated as a main process respondents felt should be automated (42.2%). This was followed by desiring the ability to adjust agent's schedules in real-time without having to go through an automated process (40.6%). The gap created by the current tools in the areas of real-time or based on volume adjustments is subsequently detrimental to at least two of the aforementioned focus initiatives: delivering improved service at the same or lowered costs, and improving quality and interaction insights.

Additionally, prior ICMI research on multichannel forecasting found that when agents are involved, or engaged, in creating schedules, new and creative techniques may be developed. Therefore, if agents were able to be creatively engaged in their schedule creation, thereby making them more engaged in their workplace, would they be more willing to adhere to the schedule they helped to develop? Presently, the lack of engagement between the agent and the scheduling process is also at odds with one of the higher ranking focus initiatives: reducing turnover. This supports the assertion that by fixing the tools of WFM, other stress points may also be alleviated.

RANK SCHEDULING CAPABILITIES IN ORDER OF THEIR IMPORTANCE TO YOUR CONTACT CENTER

1 Schedule optimally across multiple sites **(36.0%)**

2 Optimize use of employee's multiple skills **(32.2%)**

3 Facilitate ease of editing and adjusting schedules **(9.1%)**

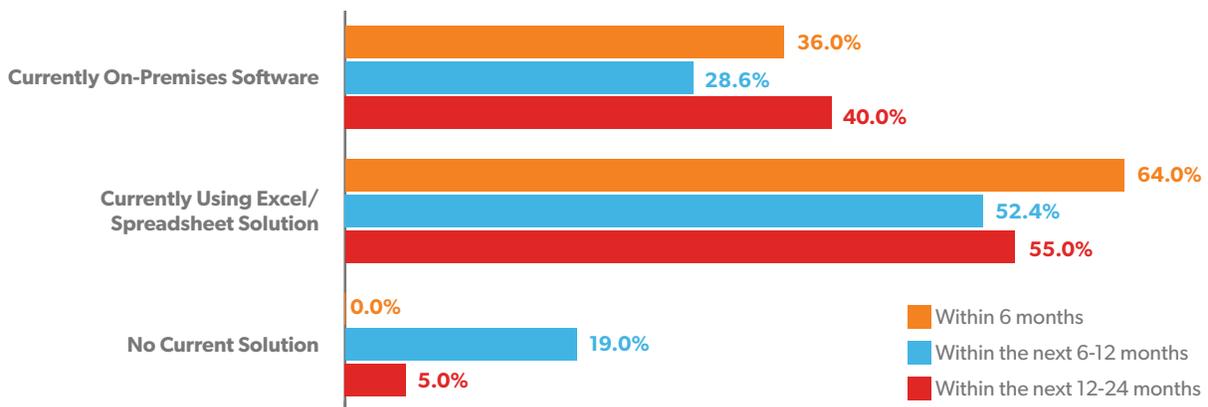**4** Analyze and report on schedule accuracy **(8.6%)**

After identifying the gaps with the current WFM tools, it's also important to understand other areas that are important to these individuals when addressing their scheduling concerns. In terms of the contact center, 36.0 percent of respondents ranked the ability to schedule optimally across multiple sites as the most important capability. The second highest ranked capability was the optimization of employees multiple skills (32.2%). When asked the same question about potential back-office WFM tools, respondents ranked optimization of employees' multiple skills the highest (77.0%) and the ability to analyze and report on schedule accuracy the second most important (66.7%). These are important features to keep in mind when developing WFM software or thinking of changing the present tool your contact center is using. Is the answer in cloud-based software?

Is Workforce Management Moving to the Cloud?

Fifteen percent of respondents report using a cloud-based WFM solution, which ranked third behind on-premises software (39.1%) and Excel/spreadsheet-based solutions (28.1%). Cloud-based software use varies based on the size of the contact center. In contact centers with fewer than 50 agents, 12.5 percent of respondents are using cloud-based software; 36.3 percent of respondents with contact centers size ranging from 50-500 agents are using cloud-based software; and contact centers with 500 or more agents report using cloud-based software most frequently, at 84.7 percent. This finding would suggest that there is a positive correlation between the size of the contact center and the use of cloud-based software.
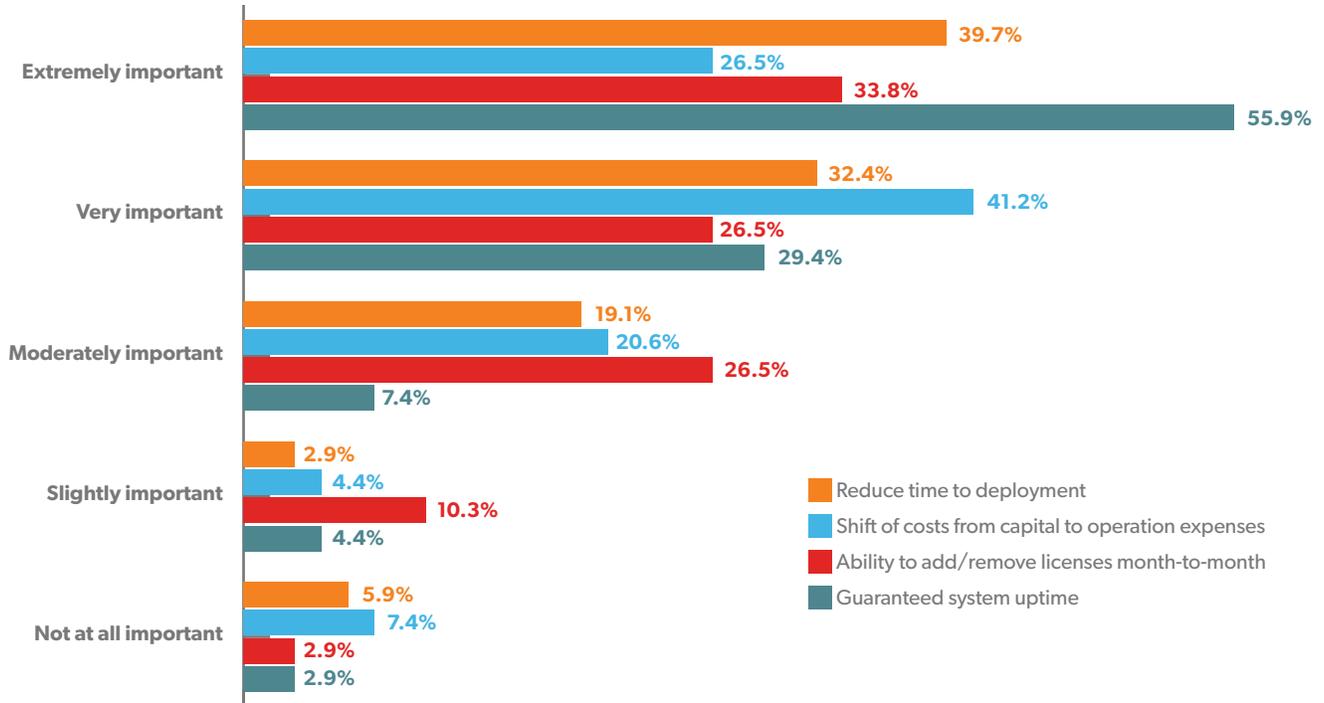
More importantly, the respondents who aren't presently utilizing a cloud-based software were asked if they plan on moving in that direction. Forty-two percent of respondents indicated that they have no plans to move to a cloud-based solution; 35.9 percent of respondents had not yet decided; and 22.4 percent of respondents indicated that they have plans to move to a cloud-based solution within the next 6-12 months.

CURRENT WFM SOLUTION USED BY CONTACT CENTERS PLANNING TO MOVE TO THE CLOUD

Currently On-Premises Software
- 36.0%
- 28.6%
- 40.0%

Currently Using Excel/ Spreadsheet Solution
- 64.0%
- 52.4%
- 55.0%

No Current Solution
- 0.0%
- 19.0%
- 5.0%

Legend:
- Within 6 months
- Within the next 6-12 months
- Within the next 12-24 months

It would appear as though respondents who are currently using Excel/spreadsheet-based solutions have the most immediate plans to move to a cloud-based software, followed by those using an on-premises solution. This would support the trend that contact centers of a larger size are utilizing cloud-based systems. Those respondents who don't presently have a solution appear to have the least immediate plans to move to a cloud-based solution. Respondents who don't have a current solution were also shown to be largely within the "fewer than 50 agents" bracket.

DESIRED BENEFITS OF MOVING TO THE CLOUD

Extremely important
- 39.7%
- 26.5%
- 33.8%
- 55.9%

Very important
- 32.4%
- 41.2%
- 26.5%
- 29.4%

Moderately important
- 19.1%
- 20.6%
- 26.5%
- 7.4%

Slightly important
- 2.9%
- 4.4%
- 10.3%
- 4.4%

Not at all important
- 5.9%
- 7.4%
- 2.9%
- 2.9%

Legend:
- Reduce time to deployment
- Shift of costs from capital to operation expenses
- Ability to add/remove licenses month-to-month
- Guaranteed system uptime

When deciding if the WFM approach should migrate towards cloud-based software, individuals are tasked with creating a list of benefits. The graph above illustrates the anticipated benefits of moving to a cloud-based software, ranked extremely important to not important at all. System uptime was listed most frequently as the extremely important benefit (53.1%). This indicates that respondents feel as though the cloud-based systems would allow them to work more with less system interruption.

The shift of costs from capital to operating expenses was identified most frequently as very important (40.6%), and the ability to add or remove licenses month-to-month was most frequently cited as moderately important (26.6%). The respondents' viewed reducing time to deployment as not important at all (6.3%). Therefore, to capture more WFM solutions converting to a cloud-based software, it's going to be important to combat the size correlation, while keeping in mind the needs and wants of the current workforce.

The Forgotten Factors of an Accurate Forecast

There are many different aspects that must be incorporated into your WFM strategy to ensure you are capturing the most accurate forecast. By ensuring that your forecast is well rounded and encompassing of a variety of different areas, you'll be able to exceed your consumers' anticipated delivery. However, if areas of importance aren't accounted for in a forecast, you run the risk of having a less-than-accurate forecast and thereby only meeting or missing consumers' anticipated delivery. More often than not, certain areas of forecasting aren't being accounted for by WFM and/or the tool they're presently utilizing.

Shrinkage

Shrinkage is defined as the measure of time lost due to other events in contact centers. These events can include breaks, training, team meetings, absenteeism, and any other uses of agent time. ICMI's planning and management framework indicates that calculating shrinkage and base staff is an important aspect of obtaining the most accurate forecast. However, the present study determined that only 45.6 percent of respondents use a rostered staff factor calculated after base staff is determined. Additionally, 61.3 percent of respondents described their forecasting process to be creating schedules to match the workflow at the interval level. Leaving shrinkage out of a forecast raises the risk of missing service levels. If contact centers want to be fully effective and continue to reach service level goals, shrinkage must be taken into consideration, as all agents, throughout the day, are going to be taken from the phone for other activities.

Forecast Accuracy

Another area that was exposed as lacking in current forecasting models is measuring the current forecast's accuracy. Of the respondents to this survey, 19.1 percent reported not measuring forecast accuracy, while an additional 38.8 percent have a variance to their forecast (+/- 6-20%). If the almost-20 percent of respondents who aren't measuring their forecast accuracy were able to effectively measure, it may provide them with better insight into staffing, utilization, and optimization factors. Surprisingly, of the contact centers that have fewer than 50 agents, almost half (45.6%) don't measure forecast accuracy. As could be expected, this number appears to decrease as the size of the contact center increases. Of the respondents in contact centers ranging from 50-500 agents, 39.7 percent reported not measuring forecast accuracy. This is still a rather large percentage of individuals who don't know whether their current model is helping or hindering their contact centers' efforts to achieve their service level goals.

Finally, and in accordance with the aforementioned findings on intraday work, only 29 percent of respondents reported that intraday reforecasting is completed to adjust to changes in intraday volumes. While this is a small percentage of respondents, it's not surprising given the fact that the large majority of respondents reported having very limited means to make intraday adjustments to agents' schedules or to shuffle staff to meet the demands of calls in real-time. One of the primary desires from a WFM solution was to allow for real-time adjustments. Therefore, if respondents had the ability to complete such tasks, without additional manual labor, they may be more likely to complete intraday reforecasting. This would enable them to adjust to call demands, and increase their likelihood of reaching service levels.

Back-Office Activities

Back-office activities are another example of an area that isn't being taken into consideration when forecasting. Of this study's respondents, more than half (55.8%) reported employing staff back-office activities. **However, of those respondents who employ staff specifically for these purposes, 72.8 percent don't use a WFM tool for scheduling.** Therefore, only 27.2 percent of contact centers with back-office activities are appropriately scheduling them and accounting for them in their forecast. This also appears to be an area that contact centers are not stressed to change, as more than half (57%) of respondents indicated that they have no plans to integrate their back-office activities into a WFM tool.
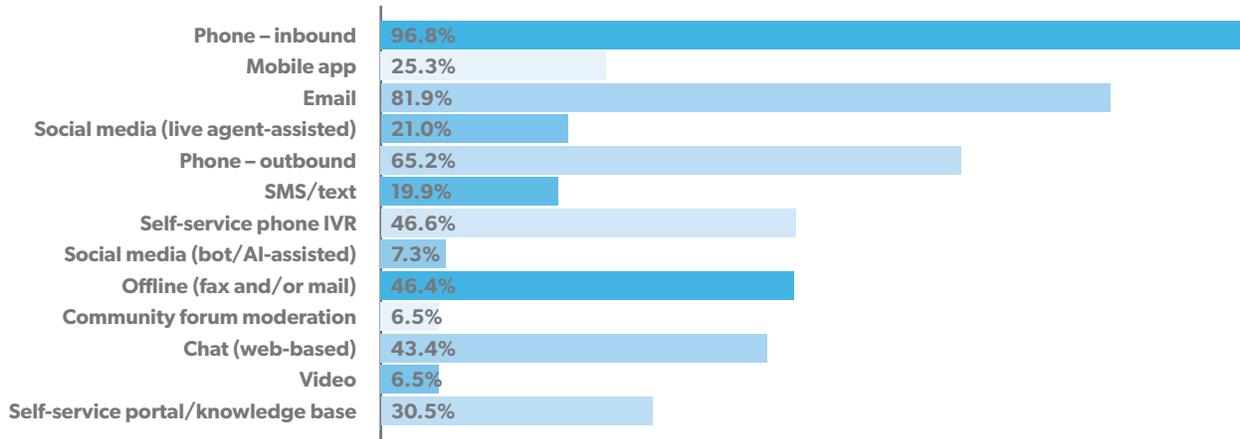
DO YOU CURRENTLY USE A WFM SOLUTION FOR SCHEDULING BACK-OFFICE ACTIVITIES?

Yes
27.2%
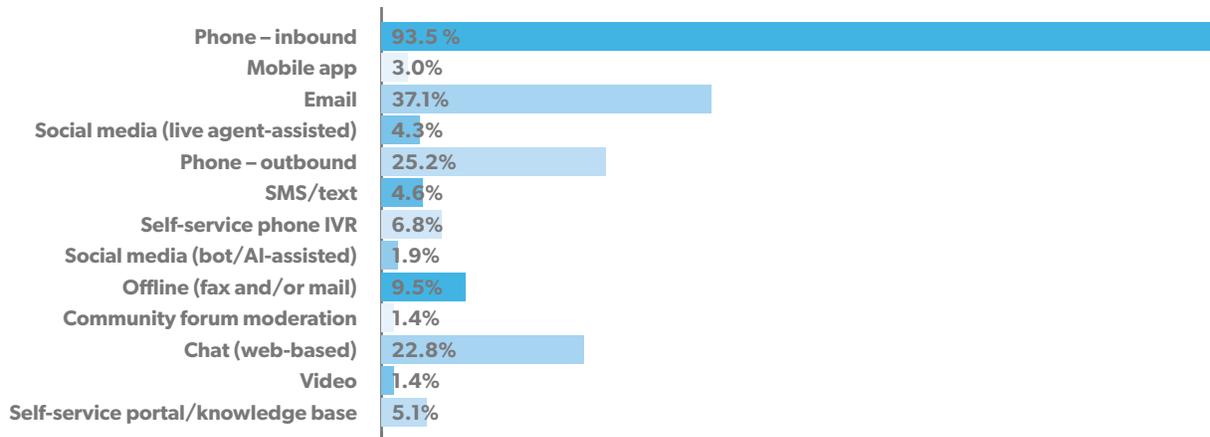
No
72.8%
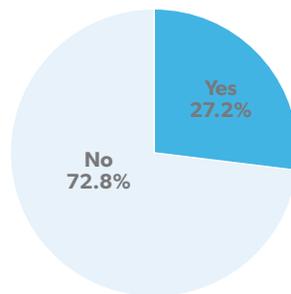
Non-Inbound Call Channel

One of the most significant findings of this research was that if the channel is not inbound call, it's not being forecasted or scheduled for through the WFM team. The majority of respondents reported supporting inbound calls (96.8%), and the second most supported channel was email (81.9%). Less than half of respondents reported supporting web-based chat (43.4%), and even less reported supporting social media (27.9%). While a wide array of other channels are supported, they're less frequently forecasted or scheduled. For instance, 93.5 percent of respondents forecast for inbound calls; however, only 37.1 percent of respondents forecast for email, even though it's the second most supported channel. This was also the trend for all other supported channels.

WHICH OF THE FOLLOWING CHANNELS DOES YOUR CONTACT CENTER SUPPORT TODAY?

Channel	Percentage
Phone – inbound	96.8%
Mobile app	25.3%
Email	81.9%
Social media (live agent-assisted)	21.0%
Phone – outbound	65.2%
SMS/text	19.9%
Self-service phone IVR	46.6%
Social media (bot/AI-assisted)	7.3%
Offline (fax and/or mail)	46.4%
Community forum moderation	6.5%
Chat (web-based)	43.4%
Video	6.5%
Self-service portal/knowledge base	30.5%

The lack of forecasting surrounding channels other than inbound call could potentially lead to a shortage of agent resources, which would negatively affect consumer experience. In terms of scheduling, the results indicate that the WFM team includes channels, other than inbound call, more frequently than they forecast for the other channels. For instance, while 81.9 percent of respondents support the email channel and only 37.1 percent forecast for the channel, 50.4 percent of respondents indicated that they're scheduling agents to assist in this channel. However, inbound call (93.2%) and email (50.4%) are still the two most frequently scheduled channels. This appears to indicate that, in terms of workforce forecasting, if the channel isn't inbound call, it's not being scheduled or forecasted to accurately accommodate consumer demands.

OF THE CHANNELS YOUR CONTACT CENTER SUPPORTS, FOR WHICH DO YOU BUILD A FORECAST?

Channel	Percentage
Phone – inbound	93.5 %
Mobile app	3.0%
Email	37.1%
Social media (live agent-assisted)	4.3%
Phone – outbound	25.2%
SMS/text	4.6%
Self-service phone IVR	6.8%
Social media (bot/AI-assisted)	1.9%
Offline (fax and/or mail)	9.5%
Community forum moderation	1.4%
Chat (web-based)	22.8%
Video	1.4%
Self-service portal/knowledge base	5.1%

Agent Engagement

The current state of agent engagement within the workforce scheduling process is lacking. As previously mentioned, having agents actively involved in the scheduling process boosts engagement. Additionally, prior ICMI research has found that having an engaged work staff agent decreases apathy and increases outputs, like consumer satisfaction. **In this study, 90.9 percent of respondents indicated that agent engagement was either extremely or very important; however, 51.8 percent of respondents reported that their agents are only moderately satisfied with the current scheduling process.**

According to the findings in this study, 32.4 percent of respondents indicate that employees having self-service tools to manage their schedules is the least important of their scheduling concerns. Of those 32.4 percent of respondents, 87.3 percent fell into the extremely or very important categories for agent engagement. It seems disconnected that those who find agent engagement to be very or extremely important don't value empowering their agents with the ability to manage their schedules. Another disconnect is that 23 percent of respondents indicated that employees don't engage at all with the scheduling process. This equates to the agent being completely out of control of their scheduling possibilities, thereby increasing disengagement. Incorporating the agent into the schedule creation process would not only improve engagement levels but also enable the WFM team to move some of their manual workload, such as changing agent schedules, onto the agents.

Conclusion

With the significant technology, channel, and consumer changes in the contact center industry over the past few years, the need for significant changes in the function of WFM should come as no surprise. For contact center leaders outside of the day-to-day duties of WFM, the disparity in forecasting and scheduling of non-phone channels should be alarming, as should the high degree of manual work that's currently applied in the majority of organizations. The quantity of contacts to non-phone channels is predicted to increase in the coming years, and it would be advantageous to deploy the systems and process to effectively handle these channels now. Despite the increased prevalence of automation, the need for and importance of forecasting will not diminish but, in fact, will grow in importance.

It is the hope of both ICMI and NICE that, through this research, contact center leaders gain a greater understanding and realization of the importance of workforce management in the contact center and use these findings to advance and evolve this critical function within their own organizations.

About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals—from frontline agents to executives—who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations and improve your customer service. ICMI is a part of UBM plc (ubm.com), a global events-led marketing services and communications company.

About NICE

NICE, the vanguard for workforce management innovation, recognizes the constantly changing demands facing the modern organization. Our solutions offer a robust feature set designed to meet the up-to-the-minute industry developments discussed in this report, including advanced task automation in back-office WFM, branch solutions for brick-and-mortar locations, and employee engagement resources. NICE's automated decisioning tools have been custom-built to reduce time spent on manual intraday management processes and improve work-life balance for agents through self-managed scheduling and personal empowerment. We invite our current customers and anyone interested in optimizing their workforce to take a closer look at NICE's offerings, including NICE WFM, NICE EVOLVE WFM and NICE EVOLVE Branch WFM, to find the solution that best fits their needs.