

# Five Ways to Make Your Workforce Management Team More Effective

Your workforce management (WFM) team does more than just plan, forecast, and schedule staff to meet workload demand. By leveraging visibility into the work, people, and resource management processes across customer touch points, they can enable you to enhance customer service while containing costs. How can you enable them to work more effectively? Here are five best practices that can help:

## 1. Produce and regularly review an operational handbook that:

- Provides a central repository of processes and procedures, and documents incidents and recovery plans.
- Incorporates not only the *what*, but the *why* behind how things are done.
- Includes “Top 25 FAQs” with questions your WFM team is frequently asked.
- Provides tiered recovery plans based on service levels. For example, it can identify three levels of service failures and clear action plans for each, so you can easily communicate what “state” you are in:
  - o Green – 3 percent out of service
  - o Yellow – 10 percent out of service
  - o Red – 20+ percent out of service
- Includes a glossary of terms to help clarify communications; e.g., “exception” can mean different things to different people.

## 2. Establish a mentor/shadow program.

Identify agents and other stakeholders to shadow a WFM team member for the day, and vice versa. This helps create an understanding of each other’s roles and can ease tensions between the groups. Agents who are frustrated because their time-off requests aren’t approved may later accept these decisions once they understand all the other factors a WFM team member has to calculate to approve or decline requests.

Agents who shadow WFM team members may also become ambassadors for the team with the front-line employees. In addition, a shadow program also helps identify any agents or other stakeholders with the right skills and passion to join the WFM team — creating a pipeline of talent for future openings.

## 3. Invest in Solution Training.

Time and again we hear that WFM system users were trained by the person who did the job before them, who was also trained by the person who did the job before them, who hopefully had received formal training on the solution from the vendor. Just like the “telephone” game, how to use the system properly and to its fullest potential can get lost in translation. Invest in vendor training to make new WFM users efficient and effective with the tools they use, as quickly as possible.



# Executive Perspective

## 4. Bond with Human Resources.

There's a natural intersection between WFM jobs and HR, as HR will be the most up-to-date on work shift rules and regulations. You should invite them to review all your practices. As a thank-you for their help, you could help them schedule their benefits fairs when it's most convenient for employee groups — going so far as to put the fair on the employees' schedules.

## 5. Create a Vision.

Don't just document your as-is state. Identify a vision of how you would ultimately like to see your team perform, and then create a phased plan on how to get there. A vision can inspire and engage team members to work collaboratively toward that goal.

This may seem odd, but it's actually very important. The belief that you are working toward something bigger and better is a great way to keep team members engaged and enthusiastic about what they are doing. But this is true only if you are measuring and sharing progress toward that goal; otherwise, it can lose its impact and may even demoralize team members.

When you empower the team managing your workforce planning processes, you can get the most out of your WFM solution. For example, Verint® Workforce Management™ can help your organization achieve its resource utilization goals by:

- Forecasting daily and long-term workload, monitoring adherence to schedule, and enabling intra-day trends to be tracked against forecasts for quick action.
- Creating employee schedules to help meet service levels consistently and cost effectively, while accounting for employee proficiencies, quality scores, skills, preferences, and performance.
- Supporting inbound, outbound, blended media, in-house, outsourced, and virtual operations in contact center, back-office, and branch customer service environments.
- Providing a single, unified solution to help organizations balance customer and employee engagement with cost constraints across customer-serving departments.

## The Customer Engagement Company™

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