WFM CHALLENGES IN DIGITAL CHANNEL MANAGEMENT

NICE

Immediate Response & Deferred Response Contacts

Deferred Work Forecasts Based on Capacity

Simultaneous Interactions: Session Concurrency Within and Across Channels

Interruptible Interactions: Channel Interrupt Priorities

Long Asynchronous Interactions

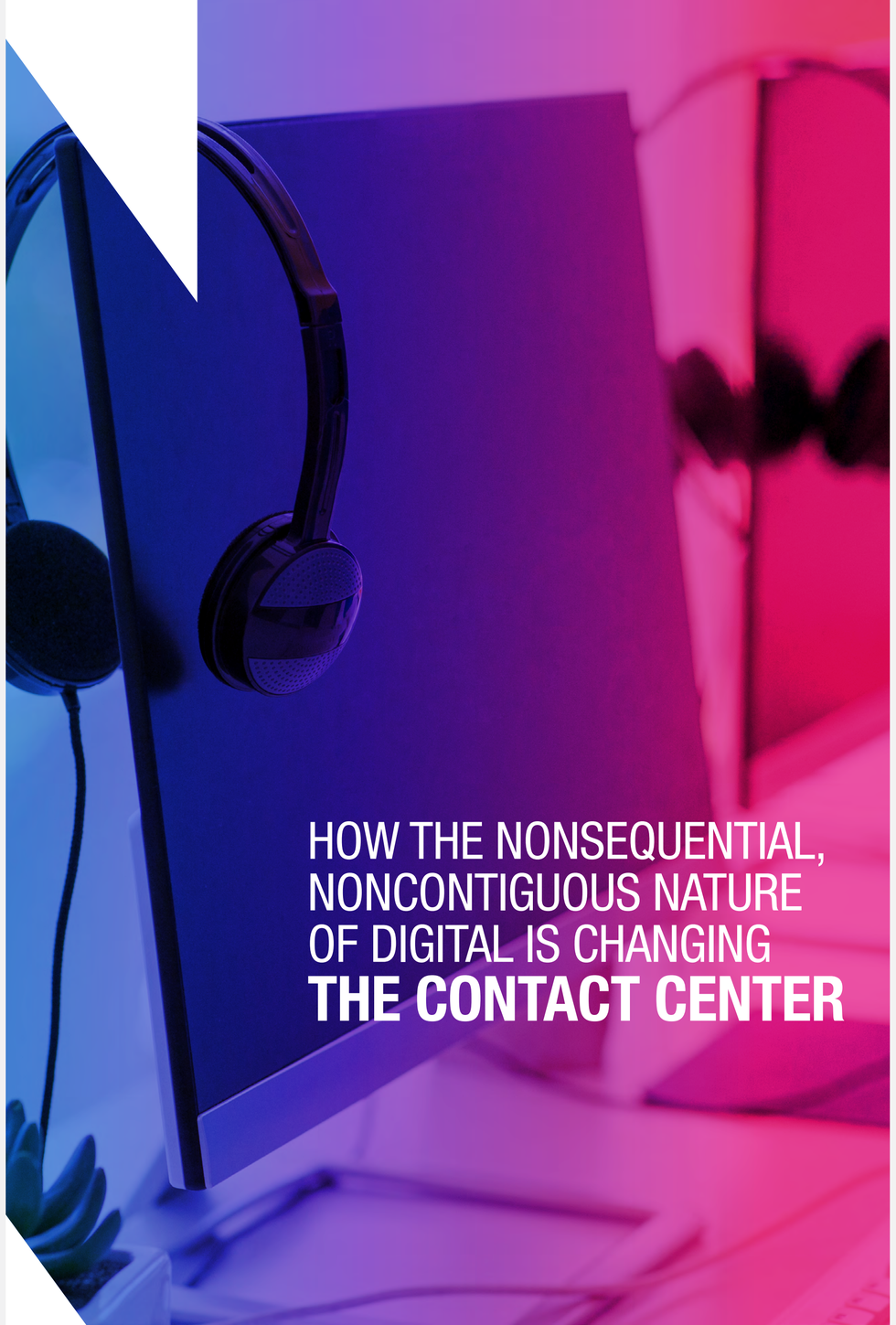
Elevated Interactions

Employee Cognitive Load Limits

Dedicated Task Time Limits

AHT Longer Than Stat Interval

Employee Self-Select Work Items



HOW THE NONSEQUENTIAL, NONCONTIGUOUS NATURE OF DIGITAL IS CHANGING **THE CONTACT CENTER**

Organizations today handle interactions and transactions across a wider variety of communication channels than ever before.

Adoption of digital channels, from email and chat to SMS and social media channels, has skyrocketed over the last year, placing new demands on support, service and sales teams; *McKinsey* estimates that digital channel adoption fast-forwarded about five years in just eight weeks' time when the pandemic shifted employees to remote work and upended business models across industries.

Digital channels became a mandate to serve customers and meet their rapidly evolving expectations.

As digital channels proliferated, they brought with them significant new challenges for workforce management.

The old ways of collecting data, calculating staffing needs and generating schedules – then doing it all again as conditions change – no longer suffice when dealing with digital channels.

In a marked contrast to the past, work today doesn't necessarily flow sequentially, in a continuous stream of work handled by a single employee. Instead, it's characterized by a series of simultaneous interactions, interruptions and more.

Digital changes everything.

Here's what you need to consider to keep your most common workforce management processes – data integrity and acquisition, staff requirement calculation, schedule optimization and change management – running smoothly.

CHALLENGES POSED BY IMMEDIATE RESPONSE & DEFERRED RESPONSE CONTACTS

Employees today are tasked with handling both immediate response contacts, such as phone and chat, as well as deferred response contacts, like email and social media. Many WFM systems and processes assume that agents who are not engaged in immediate response contacts are occupied with deferred work, up to a designated maximum occupancy level.

Balancing immediate response and deferred response contacts on digital channels introduces the following challenges in key workforce management processes:

DATA INTEGRITY AND ACQUISITION

How you report service objectives for deferred work. This will differ from how you report service level for immediate response contacts, which affects historical data reporting.

STAFF REQUIREMENT CALCULATION

How you calculate accurate and trustworthy requirements for each of those two types of contacts. Using Erlang or some adjustment to Erlang to account for multi-skill efficiency or taking a workload approach when dealing with deferred response contacts can be complicated in contact centers that use omni-session handling or have multiple simultaneous interactions.

SCHEDULE OPTIMIZATION

How you deal with multi-skilled employees and understand how their time is going to be distributed against the various contact streams. When contact streams run concurrently and non-contiguously, schedule optimization becomes even more challenging.

CHANGE MANAGEMENT

How you manage backlog and reforecast as the day progresses and your supply doesn’t meet your demand due to absences or a higher-than-expected inflow.

CHALLENGES POSED BY DEFERRED WORK FORECASTS BASED ON CAPACITY

With a digital channel such as email, contacts are often deferred. You may, for example, give agents 24 hours to work on an email, and that has implications for forecasting. And when staff is shared, with inbound work like chats or phone calls, it can have a significant effect on how work is propagated into the future.

Deferred work forecasts based on capacity on digital channels introduces the following challenges in key workforce management processes:

STAFF REQUIREMENT CALCULATION

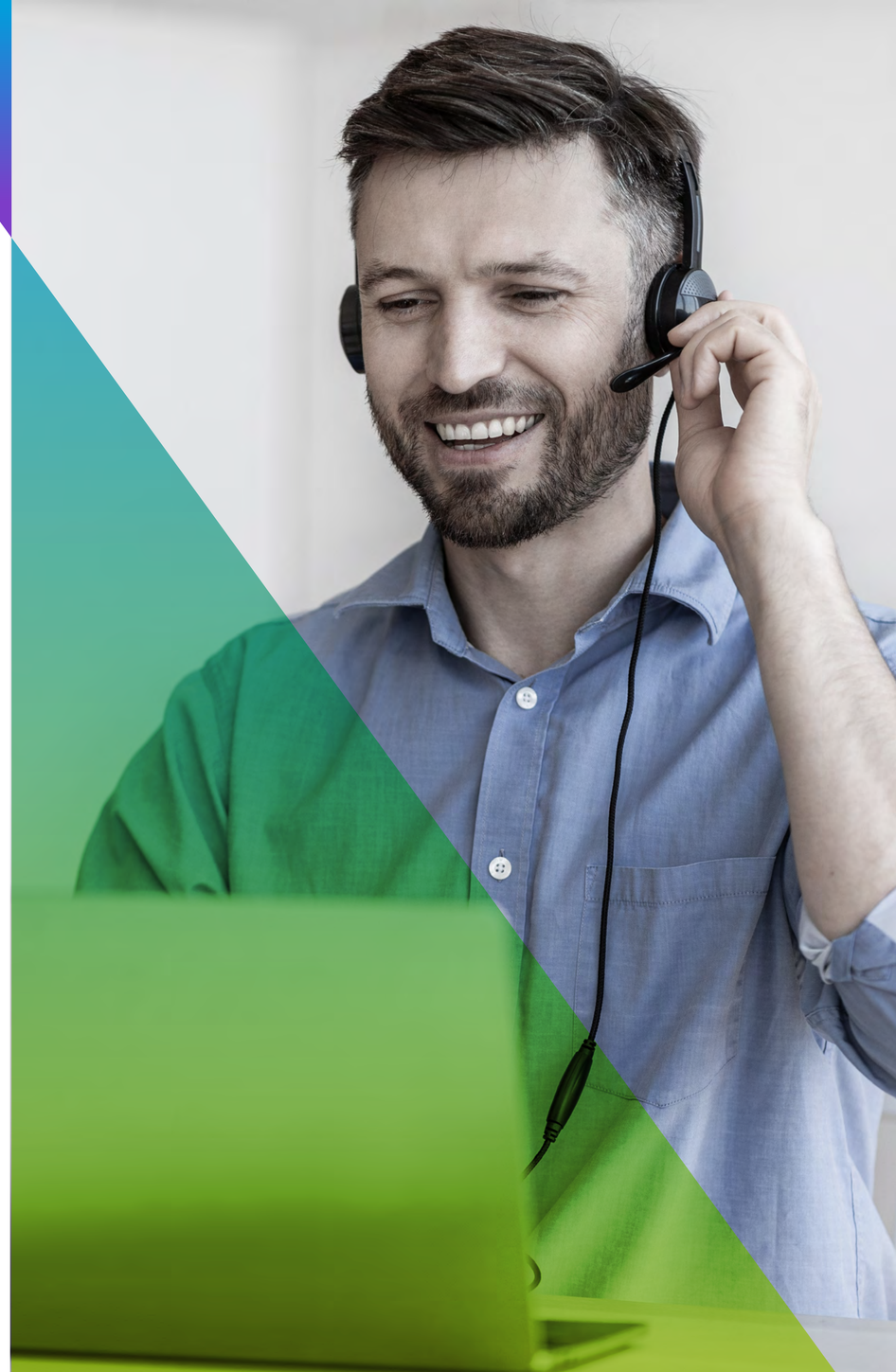
How you plan for work that is going to be spread over the course of time, considering staff capacity per interval rather than a flatline distribution of work across time.

SCHEDULE OPTIMIZATION

How you optimize and allocate multi-skilled employees' time to each work stream.

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes to adjust to the peaks and valleys of the demands you're placing on employees.



CHALLENGES POSED BY SIMULTANEOUS INTERACTIONS: SESSION CONCURRENCY WITHIN AND ACROSS CHANNELS

When you have multiple interactions happening simultaneously or interactions that overlap, understanding average handle time (AHT) and utilization becomes a much more complex undertaking. Your workforce management system also needs to be able to understand how each employee copes when handling multiple interactions concurrently – what one agent can accommodate with ease can overwhelm another.

Simultaneous interactions on digital channels introduce the following challenges in key workforce management processes:

DATA INTEGRITY AND ACQUISITION
How you interpret AHT (in focus vs. elapsed) and handle intra-interaction utilizations and messaging (the amount of downtime or wait time for both the customer and the employee).

STAFF REQUIREMENT CALCULATION
How objectives for maximum utilization, speed of answer and speed of response affect staffing needs.

SCHEDULE OPTIMIZATION
How you interpret multi-session handling limits, or how much each individual employee can contribute to the work volume.

CHANGE MANAGEMENT
How you manage the backlog, make intraday reforecasts and analyze supply capacity changes given the nature of simultaneous interactions.

CHALLENGES POSED BY INTERRUPTIBLE INTERACTIONS: CHANNEL INTERRUPT PRIORITIES

One digital channel is often more important than another when it comes to delivering the service your customers demand, and many organizations prioritize work streams accordingly. Often, it's the immediate response channels (e.g., phone and chat) that are given more attention, more quickly, by interrupting agents' work on lower priority interaction channels. Organizations need to be able to prioritize both the channel interactions as well as how a channel may be interrupted.

Interrupt priorities on digital channels introduce the following challenges in key workforce management processes:

DATA INTEGRITY AND ACQUISITION

How you define interruptibility, and how interruptions affect the AHT for different types of interactions – this depends in part on what AHT is being historically reported (total elapsed vs. parked AHT).

STAFF REQUIREMENT CALCULATION

How you calculate staffing needs, subject to data integrity and acquisition.

SCHEDULE OPTIMIZATION

How you interpret work item interruptibility when scheduling employees.

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes given your channel priorities.

CHALLENGES POSED BY LONG ASYNCHRONOUS INTERACTIONS

While customers expect an immediate response with some types of digital interactions, others are often characterized by long gaps in time that punctuate the conversation, for example if a customer steps away from his or her computer before reading an employee's response asking for more information. A conversation that starts on one day can actually finish the next day or even further into the future. How you define AHT and treat the data that's coming into workforce management has significant implications for staffing and planning.

Asynchronous interactions on digital channels introduce the following challenges in key workforce management processes:

DATA INTEGRITY AND ACQUISITION

How you define AHT for long asynchronous interactions? How do you account for the gaps within a customer interaction? Your approach will have very different outcomes for staffing and scheduling.

STAFF REQUIREMENT CALCULATION

How your interactions are defined (including AHT) affects the staffing levels you calculate.

SCHEDULE OPTIMIZATION

How does the long AHT of asynchronous interactions affect the counting and time reporting of the interaction? Are they combined as a single stream of work or decomposed into individual "touch points" that may or may not pass to different employees?

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes given how you handle long asynchronous interactions.

CHALLENGES POSED BY ELEVATED INTERACTIONS

Elevated interactions are closely related to long asynchronous interactions in that they raise the complexity involved in calculating AHT. Consider the case of an interaction that starts as a chat before the employee elevates it to a phone call and then ultimately to email. The agent may move along with the customer, continuing the conversation on each new channel, or send the customer to the general queue for assistance, depending on your processes and policies.

Elevated interactions on digital channels introduce the following challenges in key workforce management processes:

DATA INTEGRITY AND ACQUISITION

Elevated Interactions pose significant challenges to the data integrity and acquisition process. You may, for example, track the average interaction duration for the entire series of transactions within the ‘end-to-end’ interaction. How are chat escalations to calls handled? How you concatenate and interpret time will have very different outcomes for staffing and scheduling.

STAFF REQUIREMENT CALCULATION

How you calculate staffing, based on your management of data and resources.

SCHEDULE OPTIMIZATION

How you optimize schedules, based on your management of data and resources.

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes given how you handle elevated interactions.

CHALLENGES POSED BY EMPLOYEE COGNITIVE LOAD LIMITS

Cognitive load refers to individual employees' abilities to juggle contacts and responsibilities; some employees are able to multi-task and handle x number of interactions concurrently while other employees can handle y number of interactions before being overwhelmed. Overload can lead to frustration and poor decision-making. Generally speaking, the more you throw at an employee, the harder he or she finds it to switch between channels and conversations. Even though an employee can theoretically handle work up to a certain level, you start seeing diminishing returns in terms of efficiency.

Cognitive load limits on digital channels introduce the following challenges in key workforce management processes:

DATA INTEGRITY AND ACQUISITION

How you set limits across channels and track employee load-based performance data. Cognitive load includes load per type of contact; maximum capacity per employee (overall total and per type of contact); and algorithms. These algorithms ensure that "low" loads do not take precedent over "high" loads. Cognitive loads dynamically define load per type of contact and dynamically adjust employee capacity.

STAFF REQUIREMENT CALCULATION

How you make cognitive load limit adjustments to base staffing requirements.

SCHEDULE OPTIMIZATION

How you make cognitive load limit adjustments to individual employee contribution when creating schedules.

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes given how you handle employee cognitive load limits.

CHALLENGES POSED BY DEDICATED TASK TIME LIMITS

A lot of different things come into play when you start talking about task management, or blocks of time management – for example, when an employee is asked to spend time focused solely on managing a social channel. How do you manage the appropriate blocks of time, the amount of time, where it's placed and who gets it? And how do you do so fairly?

Dedicated task time limits on digital channels introduce the following challenges in key workforce management processes:

SCHEDULE OPTIMIZATION

How you optimize maximum and minimum task time constraints and ensure fairness.

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes given how dedicated task time limits are handled in your organization.

CHALLENGES POSED BY AHT LONGER THAN STAT INTERVAL

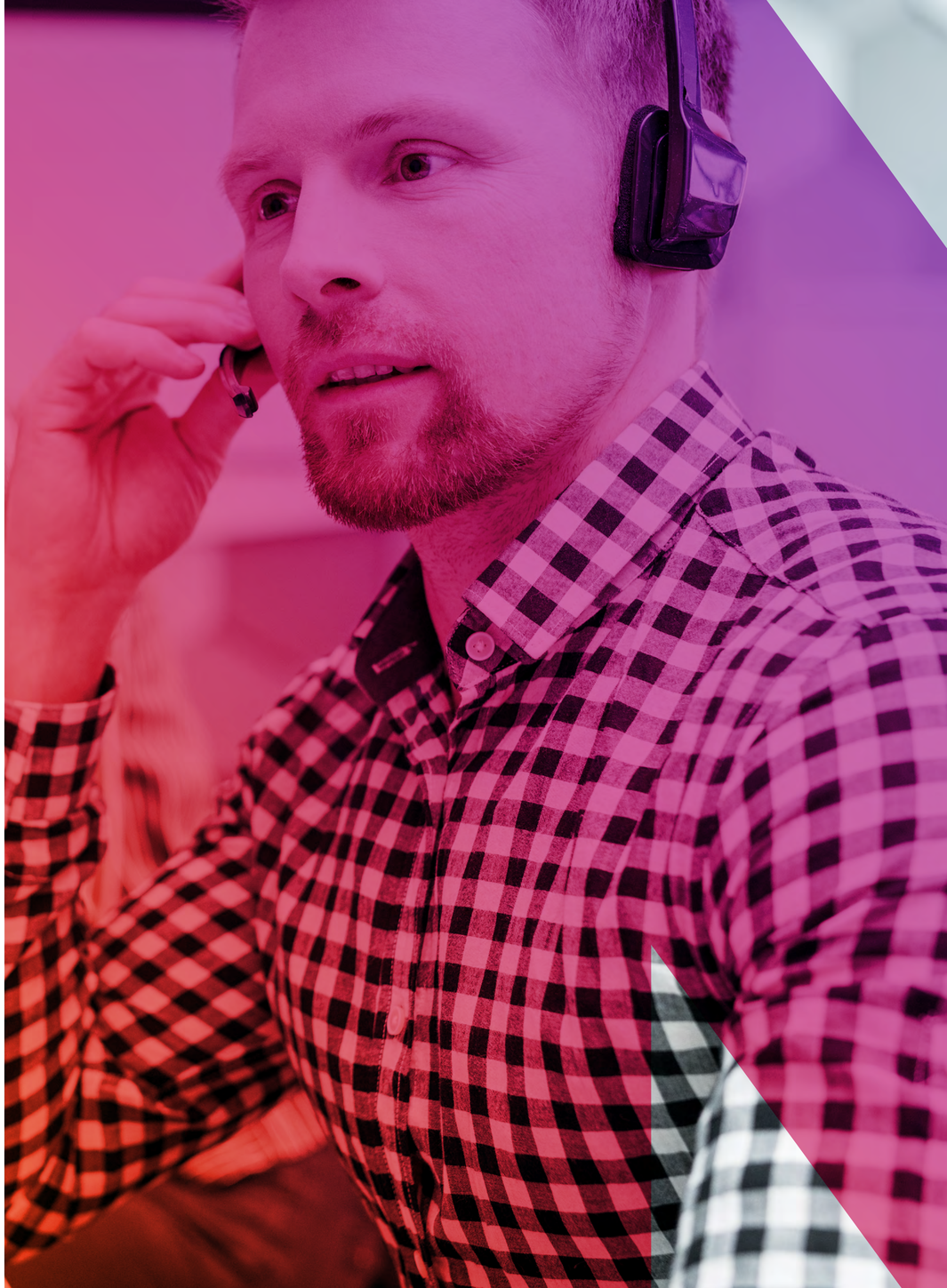
Work time, such as AHT, sometimes exceeds your planning interval. It could be as simple as a 15-minute interval and a contact expected to take 30 minutes to resolve; you can't simply multiply the one contact by the AHT to arrive at the workload, because two people working simultaneously in that 15-minute increment can't handle the same contact and get it done more quickly. Work must be carried over to the next interval.

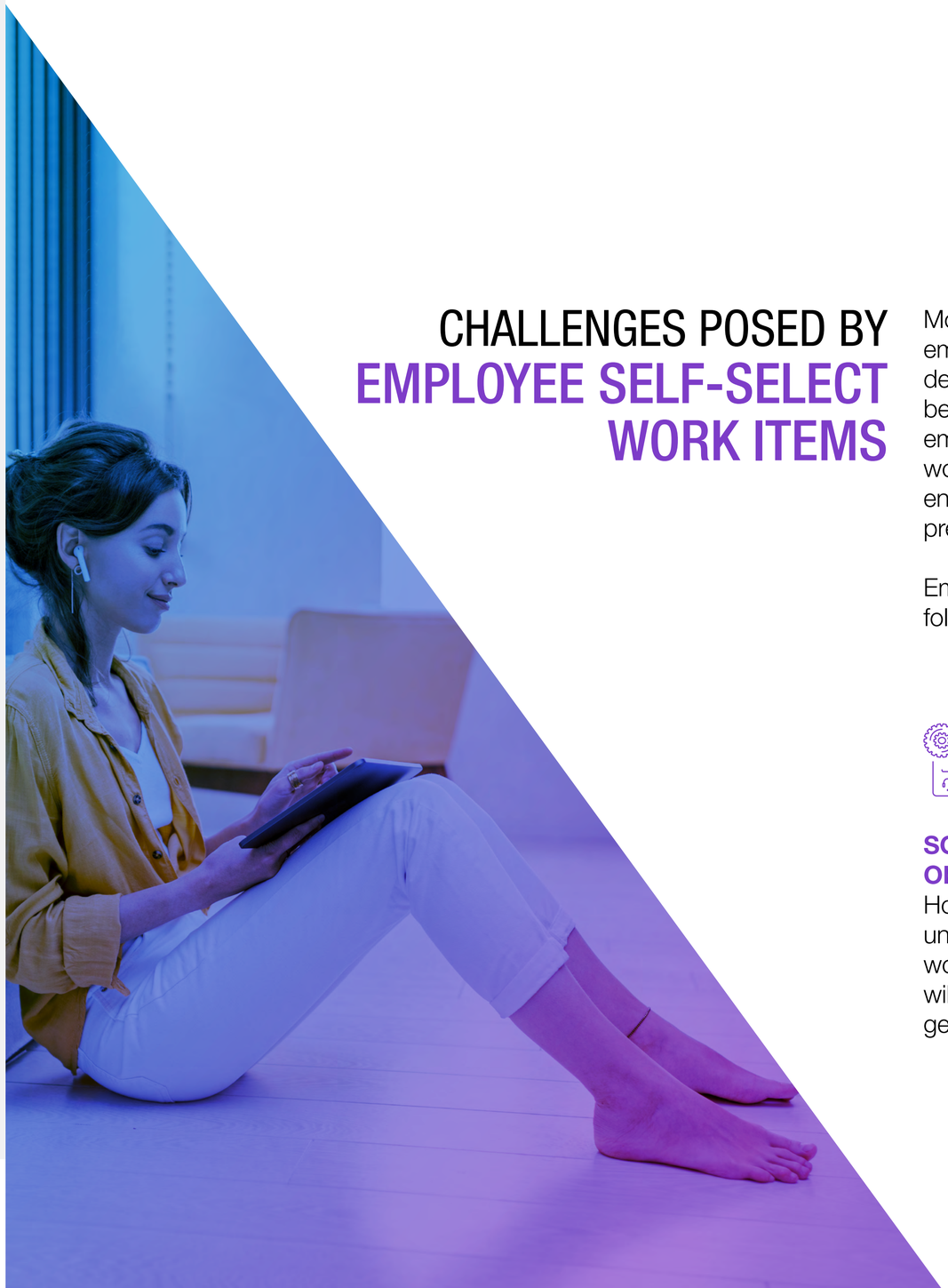
Carryover work on digital channels introduces the following challenges in key workforce management processes:

STAFF REQUIREMENT CALCULATION
How you establish a new paradigm for carryover work.

SCHEDULE OPTIMIZATION
How you optimize schedules for employees engaged in work that stretches across intervals while keeping track of who is engaged, and who isn't, with work from prior intervals.

CHANGE MANAGEMENT
How you manage the backlog, make intraday reforecasts and analyze supply capacity changes when AHTs exceed the stat interval.





CHALLENGES POSED BY EMPLOYEE SELF-SELECT WORK ITEMS

Most ACDs are based on the concept of pushing work to employees – the ACD keeps track of the work coming in, queue depth, service objectives and routing rules and connects the best employee with the work. In some organizations, however, employees are allowed to choose the type of contacts they will work on during their shifts. Effective planning in that kind of an environment requires artificial intelligence (AI) able to interpret and predict employee behavior.

Employee self-select work items on digital channels introduce the following challenges in key workforce management processes:

SCHEDULE OPTIMIZATION

How you leverage AI to understand and anticipate which work items a given employee will choose and use it to generate schedules accordingly.

CHANGE MANAGEMENT

How you manage the backlog, make intraday reforecasts and analyze supply capacity changes when employees are able to self-select work items.

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WFM FOR DIGITAL **CHANNEL MANAGEMENT**

Digital channels offer a wealth of opportunity for sales, service and support organizations to better meet the needs of their customers – and often in a much more cost-effective manner than non-digital channels. At the same time, however, they introduce a new range of complexity in how you handle data integrity and acquisition, staff requirement calculation, schedule optimization and change management.

By understanding how each of these workforce processes is affected by the unique characteristics of digital channels – from immediate and deferred response contacts to deferred work, simultaneous interactions and more – you can position your organization to meet the needs of your customers and break new ground on the digital frontier.