

Staffing and Workload Management: Challenges and Opportunities

By: Bradley J. Baumunk, President of B. Baumunk and Associates

Every contact center is challenged with having the right people available for work at the right time in order to meet the predetermined service level goals (typically measured as % of calls handled within X seconds, e.g. 80/30). This is the balancing act of the forecasting team and the scheduling team. But no matter how good your forecast and schedules are, ensuring adherence to the schedules is paramount to hitting the goal.

This becomes very challenging when you are trying to handle different types of work by manually moving people around on an hourly, daily, weekly, or even monthly basis. For example, on an hourly basis your operation may move people from inbound calls to non-call transactions (e-mail, faxes, legacy system work, etc.) to try to balance and meet service levels. If you are moving people on an hourly basis, by the time you move them from non-call work to phone work to handle a call spike, the spike has likely already passed and now your resources are in the wrong place again, which further adds to frustration. Even if you are trying to manage this way on a daily, weekly, or monthly basis, it is often very ineffective and exasperating to employees. As for the longer term plans, they tend to cause employees to lose skills since the employees are not getting the needed repetition on a consistent basis.

The scenario above doesn't take into consideration back office work that isn't part of the contact center today. For example, most forecasting teams have not been asked to forecast the

work, and the employees are typically not being scheduled to handle the work. In fact, in many environments, the back office employees don't have a telephone at their desk.

Recently I worked at a company in the area of workforce management. In my first weeks on the job I was provided with call arrival pattern graphs and staffing graphs. Based on the graphs we should have been meeting or exceeding our service level goal (80/30) but, in fact, we were missing by a mile. Upon investigation I learned that many of the people being counted as phone employees were off the phone doing back office work, Siebel service requests, legacy system queue work, handling faxes and USPS mail, and other work. When I asked if we had reporting on the type and counts of work, it turned out we didn't. Over a six month period we had to capture the work types and counts manually and build it into our workload forecasts. It turns out that this accounted for approximately 40% of our workload.

Handling calls based on the menu choices a customer makes and the skills an employee has acquired through training is a process that most every contact center is using, some at higher degrees of complexity than others. But what if you could get the same statistics automatically and route the non-call work based on skills and priorities that you establish?

Aligning Skills and Service Levels

Let's take the example of a customer using e-mail as a first means of contact. If this is handled by a group of employees who have been skilled to strictly to handle e-mail responses, what is your service level goal for those e-mail responses? If your e-mail service level goal is 48 hours, yet customers are calling within 24 hours to find out why no one has responded to their e-mail, there is a disconnect that is causing double work and unnecessarily adding to your call volume.

With the proper solution in place, contact center employees would be trained and skilled to handle phone calls and e-mail, and the service levels would be aligned to ensure that the e-mail was responded to before the majority of customers call for an answer.

The real benefit would be that you'll have a larger pool of workers to handle the work, and you'll be able to more effectively distribute work items by taking advantage of availability and skilling. Occupancy would now be more consistent throughout the day and your employee experience improved. Work could also now be pushed to your employees when they are available.

The marriage of contact center and back office has implications as to how you hire, how you train, and the career path you provide your employees — and will directly translate to decreased attrition, improved employee satisfaction, and a better customer experience.

About Brad Baumunk

Bradley J. Baumunk is President of B. Baumunk and Associates, a consulting company specializing in contact center and back office workload distribution, workforce optimization, and call center best practices — including performance management and attrition reduction solutions to contact centers which translate to higher customer satisfaction.

During the past 20 years, Baumunk has held leadership roles at companies including GC Services, FDC, Ticketmaster, PRC, Volaris, America Online, Echostar (Dish Network), and Farmers Insurance where he oversaw different functions including recruiting, human resources, workforce management, training, operations, and IT. These centers ranged in size from 150 – 800 seats with hours of operation 24 X 7 X 365. Baumunk has proven skills to manage multiple queues — including collections, sales, customer service, technical support, directory assistance, and retention —in B2B and B2C environments.

Baumunk is focused on continuing innovation and thought leadership to solve the challenges faced by contact centers and back office operations. B. Baumunk and Associates provide performance-based solutions that enable a seamless experience, improve productivity, exceed the expectations of its clients, and enhance overall corporate profitability.

Described as ebullient, focused, witty, passionate, sincere, hard-charging, and dynamic, Baumunk has infused clients with his own brand of energetic leadership, vision, and spirit. Baumunk grew up in St. Louis, MO and graduated from the University of Missouri with a bachelor's degree in Finance. Baumunk is an active participant in his community, and has served on the Boys and Girls club Board, Chamber of Commerce, and Education Foundation Boards.