

# The Ultimate Guide to Improving Agent Efficiency and Morale with WFM Software





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# Introduction

Agent efficiency and morale are both hot topics in the contact center industry. With competition for great agents now higher than ever, what needs to be done to keep agents happy and thriving? Our eBook discusses some of the recent changes to the traditional contact center and how an excellent workforce management (WFM) software solution can be a key component in improving agent relationships and productivity.





## Chapter I

# Split Shifts: The Pros and Cons of the (New) Workforce Management Trend

Some contact center managers may have considered split shifts in the past, but for many it just wasn't a feasible solution. Asking your agents to drive into the office for only a few hours at a time didn't make sense for anyone involved.

However, because of COVID-19 organizations have been forced to expand their remote workforce and the idea of split shifts makes a lot more sense. With everyone working at home, the commuting to the office component doesn't exist anymore, which opens up more realistic opportunities for different types of shift work.

Here are some of the main pros and cons of split shifts so you can determine if this workforce management trend would be a good fit for your contact center.





## Pros

### **Different Work-Life Balance Appeals to Unique Agent Pool**

Simply put, a 9 to 5 career isn't right for everyone. Maybe someone needed to leave the workforce to care for their children or parents and can no longer work full time. Does this mean they aren't interested in working? Of course not! The nice thing about split shifts is they often provide a gap in the middle of the day to focus on life responsibilities, and a common reason why split shifts are increasing in popularity is for parents looking to make extra money. They drop their kids off at school in the early morning, come home to work their first shift, then clock out. After they head back to the school to pick up their children, they'll come home and make dinner before clocking into the second part of their shift before bed. Split shifts are a great option to find motivated agents that require schedule flexibility. Companies like Uber have driven this "work when you can" mentality to the forefront of business, and more contact centers are following suit.

### **Easier to Staff a Workforce Up and Down Workforce to Meet Contact Demand**

One of the biggest advantages of split shifts is that with the right workforce management software you can quickly ramp up or decrease your workforce based on contact volume. For example, if you find out a marketing promotion is set to launch next Friday afternoon, you can schedule agents to work the early morning shift when call volume is the highest, take a break in the late morning through lunch, and then work another shift after the promotion goes live.

### **Higher Productivity from Agents When On the Clock**

Combating agent fatigue can be an issue for contact centers. You simply can't expect an agent to function at the same level as when they clocked in after they've been working for seven hours. This type of fatigue isn't an issue with split shifts. Agents often work in short 2-3 hour bursts, meaning they are often able to take a mental break after their first shift and come back recharged for the second shift.



## Cons

### **Unreliable Hours if Split Shifts are Linked to Demand**

Split shifts tied to contact volume can fluctuate based on projected demand spikes. One day an agent could be scheduled for an early morning and late afternoon split, and the next day they will have a mid afternoon and evening split. This type of work can be difficult for agents that usually have time restrictions in their schedule for personal reasons, like not being able to work early mornings or evenings, and could result in these agents becoming frustrated with split shift scheduling.

### **Split Shifts are Not for Slow Starters**

There always seems to be that one person in an office that is slow at getting settled in and doing work. They clock in, get water, make breakfast, and talk to colleagues. They're basically doing pretty much anything except starting on their work. But, somehow they manage to keep their productivity high and get their job done. This mentality may be tolerated over long shifts where an agent has an opportunity to make up for a slow start, but with split shifts there isn't time. Recovering from a half hour of slacking off on an 8-hour shift can and does happen, but when a shift is only three hours there is a bigger priority to start working right away.

**To summarize,** there are some clear pros and cons to split shifts, but there are also opportunities for many contacts centers to leverage some form of this (new) workforce management trend. The first step is to identify where a split shift would make sense, and then get a feel among your agents who specifically would be interested in working a split shift. Split shifts aren't for everyone, but they can be a unique solution to improve agent happiness. They also enable companies to find highly qualified agents who are out of the workforce because the typical workday doesn't sync up with the demands of their current life.



## Chapter II

# How Workforce Management Software Streamlines Illness Related Scheduling Changes

In the world we live in today, an illness is a major cause for concern. Not only because of fears surrounding contagion and catching what others have, but also because companies are often facing other obstacles to the way they normally work.

For many companies, COVID-19 has led to a shift in making workforces fully remote or implementing social distancing policies for agents working in physical locations.

As a whole, these changes haven't made the job as a workforce management (WFM) professional any easier. A routine shift swap or agent reassignment now has an added layer of complexity – illness and the precautions that come with it – that need to be considered.

As a result of these changes and evolving complexities, more companies are ditching the spreadsheets and switching to a real workforce management software solution. How can this technology address and simplify the changing needs of a staffing leader in a business? Here are the top ways WFM software streamlines illness-related schedule changes.

## Know immediately when there's an absence

For some WFM professionals, time is spent manually every morning going through the schedule for the day to see who actually shows up. A modern workforce management solution with ASAM (automated schedule attendance monitor) can automate this process by tracking agent logins and on-time arrivals. Knowing who is missing, even if they forget to inform you, is a critical first step. Take the time allocated in the past to doing a head count to instead better understand why there are absences on the team.

## Quickly reschedule meetings to cover

Once we know who is out sick and with what, there's often a need to change multiple agent schedules to remove "non-essential" events for the day like training. Instead of rescheduling agent training one by one, reschedule them all in a few clicks in a workforce management software solution.

## Automatic shift filling notifications

As a workforce management leader, it's possible an hour may be spent calling, emailing, and texting people individually, hoping someone responds and is willing to pick up the shift on short notice. This process can be entirely avoided with WFM software. A few clicks in the system will notify agents not only about the shift but also on their preferred method of communication (email, text, etc.). Talk about a time saver!

## Create more organized agent profiles

Even if an agent can pick up the shift, they may not have the exact same skillset as the agent they are replacing. For example, the agent that's out sick be strong on the phone while the replacement agent may be better at email. This can lead to more reshuffling of agent responsibilities and confusion. With a WFM software solution, it's possible to set up dynamic and organized agent profiles so only the agents with the right skills (channel expertise, language spoken, etc.) are being asked to pick up the shift.



## Ensure agents won't hit overtime

Booking an agent into accidental overtime is a tough mistake to make. It can cause friction with upper management who don't want to pay overtime wages and also with agents who don't understand why they aren't given an opportunity to work overtime. Fortunately, in WFM software this can be avoided because hours are tracked in real-time and agents that would exceed 40 hours by picking up the shift can be automatically excluded from being asked to cover for the sick colleague.

## Monitor adherence to see illness impact

When a popular or highly productive agent has an unexpected absence for several days, especially in the COVID-19 era or work, people start to talk. In WFM software it's easy to continually monitor the productivity of all agents by keeping an eye on the daily adherence to their schedule and what they're supposed to be doing. If there is some unexpected adherence deviation by long-time agents, it may be time to let upper management know so morale boosting efforts can be made to improve productivity and reduce uncertainty.

A leading workforce management software solution can make all the difference when an agent comes down with an illness. Leverage the technology to streamline a potentially problematic scenario to find the right person to cover almost immediately and keep productivity at a high level.



## Chapter III

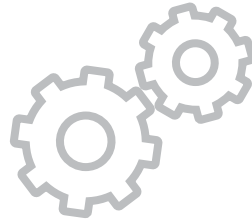
# Shift Bidding Helps Agents Balance Their Work-Life Needs

Many contact centers use shift-bidding processes to empower agents and minimize schedule change requests because agents have the schedules they prefer.

Automating the process can have the perception that each agent has the same chance of getting a good shift that fits their availability and preferences. Shift-bidding also promotes morale and takes stress off of agents while providing the contact center with accurate schedules that meet forecasts. Cloud-based workforce management solutions with automated shift-bidding features give companies a competitive edge, while giving employees more flexibility to maintain a healthy work-life balance.

### **What is Shift-Bidding?**

One of the many operational tasks contact center analysts or supervisors perform on a regular basis is creating schedules for their customer service representatives (CSRs) or agents. Although this can still be a laborious and time-consuming task when performed manually, the end result can often lead to agents that are unhappy with their assigned shifts. With today's modern workforce management software technology, agents may be granted the opportunity to see all available shifts and select the shift that is most appropriate for their life style. This process of open scheduling is known as shift-bidding.



## Automating the Shift-Bidding Process

One innovative feature in modern workforce management software solutions is accessing shift-bidding within a dedicated agent portal. The agent portal in the CommunityWFM software solution empowers agents to stay in touch with supervisors and schedulers to automate all of their schedule related requests. An interactive bidding mechanism enables the agents to select and rank available shift inventory for a pending bid.

The agent portal can be used to send email, text messages, or to find the Community Everywhere® mobile application, allowing agents to stay informed of the latest changes to their schedule and the status of their time off requests. Agents can receive notifications of offers for voluntary time-off (VTO), overtime, and other events. Once an offer is accepted, the agent schedule is automatically adjusted, and their supervisor is also notified of the schedule change.

Other features such as Automated Schedule Adjustment Plans (ASAP) streamline the intraday workforce management process. This means that schedulers no longer have to manage schedules on a single, ad-hoc basis. Instead, they can efficiently flex the schedules of their entire agent workforce and deliver messages on multiple notification channels with just a few entries. ASAP has been so useful in some contact centers that agents may not be able to keep up with all the offers available to them.



## The CommunityWFM agent portal goes beyond the shift-bidding process.

It enables agents to set their hours of availability, a preference for start times and days off, submit shift bids, and review their schedules by day and by month. Agents can also easily review all of their approved, denied, and past time off requests. CommunityWFM also provides agents with access to the following important schedule and shift bid actions:

- Request time off such as vacation and family leave.
- Post a partial or entire shift swap request using a virtual shift swap board
- Set up communication devices and channels for notifications
- Review their adherence statistics
- View other agents schedule in their team
- Receive pop up reminders for scheduled events
- Receive solicitations for events such as overtime or time off
- View targeted “Hot News” about the center or schedules
- Participate in single or multi-vote surveys
- Send and receive CommunityWFM memos regarding their schedule
- Watch help videos for all of their scheduling needs

**To summarize,** scheduling has become pretty complex. Simplify your workforce scheduling through shift-bidding to create a modern and simplified approach to workforce management.



## Chapter IV

# How WFM Software Can Help When There's a Surge in Agent PTO

With the busy holiday season approaching, many workforce management (WFM) analysts and managers are seeing an increase in paid time off (PTO) requests hitting their inbox.

However, even though it would be great to give everyone the time off they want, it's still paramount that you have the right number of skilled agents to handle customer requests. And, depending on your industry, the holiday season can be the busiest time of year for contact volume.

So how do you balance the demand for PTO with the demands and service levels required to keep your contact center operating at desired levels? Here are a few ways how WFM software can help when there is a surge in agent PTO requests.





## Automatically manage and block off vacation time

One of the toughest scenarios you can face when dealing with PTO is deciding who gets time off and who doesn't. If you're still manually handling PTO or exclusively using an HR system, multiple agents could request the same day off in a span of hours when the schedule will only allow for one of them to be away. Avoiding scenarios like this is why more companies are turning to WFM solutions with built-in PTO and vacation features. Instead of conflicts, the day can be automatically blocked off from PTO after the first request is submitted.



## Let agents see real-time vacation availability

Simply put, trading emails with agents about PTO availability isn't a great use of time for anyone involved. It's yet another reason why companies are leveraging some of the PTO capabilities within their WFM software, including areas where agents can see exactly what days are available for PTO requests. This feature helps agents know what day or days to request off. Best of all, being transparent with time off at a company level can encourage people to submit PTO requests earlier than usual, which helps to improve the accuracy of WFM schedules.



## Leverage WFM software to quickly fill shifts

While encouraging agents to schedule time off far in advance is great, the reality is sometimes a rise in PTO requests happens at the last minute. For example, maybe a nearby school is suddenly closed due to bad weather and now several agents need time off for childcare. When this happens, don't start calling agents left and right to look for someone to pick up a shift. Instead, leverage a WFM software solution that allows you to build out plans for rapid responses when these situations arise. Known as automated schedule adjustment plans (ASAP), these solutions can help find agents with the skills you need in minutes. When one or several shifts become available, it's easy for a WFM analyst to push news of these openings to specific agents directly via multiple channels, including through a WFM mobile solution.



## Use group messaging to provide incentives for not selecting days off

There are always specific days that are in high demand for time off. This isn't a new revelation, but there is a newer method for WFM analysts to organize these PTO requests. Over time, it has become more common for WFM analysts to view and monitor how many PTO requests are coming in for specific days. As the total number of requests starts to approach the maximum number of agents that can have the day off, you can communicate to all supervisors what they need to do to reduce PTO usage. You can let them know directly through your WFM software that it's time to offer their agents incentives (gift cards, pizza party, double pay, etc.) for working specific days to discourage additional PTO requests.



## Chapter V

# Planning Your Future Workforce by Making the Most of Gig and Temporary Employees

A recent study by EMSI predicts that by 2025 temp and gig work will account for more than **3.2 million jobs** in the U.S. economy.

In the past, many companies haven't needed to worry all that much about gig or temporary employees. Often associated with industries that have wide swings in demand – such as transportation and delivery – gig (also known as short-term freelance) employees were once a rare and niche segment of the workforce.

However, especially in the COVID era of remote jobs, temp and gig work is expanding to many different industries. A recent study by EMSI predicts that by 2025 temp and gig work will account for more than 3.2 million jobs in the U.S. economy. This growth is led by the “production” sector and cites jobs related to customer-focused services, like customer care, as leading the charge in new gig and temp employment opportunities.

The era of the temp and gig agent working with the customer is already a reality for an increasing number of companies and isn't far off in the future for many more. Here are a few strategies for how companies can prepare for future workforce with gig and temp employees.



## Utilize automated schedule adjustment plans (ASAP) to book hours

Naturally, you'll only want to book a gig or temp employee when you need them in your workforce schedule. This is where ASAP comes into play, making it easy for a WFM professional to get the right agent at the right time. For example, if there's an issue with a product sold in Latin America and Spanish-speaking contact volume is higher than normal, a WFM analyst (assuming skills were properly configured in the WFM software) can push out an urgent shift alert. When this happens, all Spanish-speaking agents not currently working will receive a text or mobile notification that a shift is available due to high volume.

## Keep an eye on performance in different ways

Sometimes temp or gig employees may require more attention out of the gate to ensure they are meeting your needs. Adherence monitoring through your WFM software is essential for making sure agents are punctual and stay on task, especially for remote workforce teams, but quality monitoring of their interactions with customers also remains important.

## Provide recognition for gig and temp workers

Lastly, depending on the corporate culture, a gig or temp worker can sometimes feel like they aren't a part of the team. Don't unknowingly create an internal divide between gig and full-time employees. Instead, ensure gig and temp workers get the same level of recognition and opportunities from leadership. If it makes sense for your business, offer a gig employee overtime or an added bonus in pay if they are willing to be flexible with their shifts.



## Hire the type of gig worker that fits your business model

Not all temp and gig agents are created equal. Some of the workforce is retired or semi-retired and are just looking to pick up an hour or two a day from their home as demand spikes. Other agents may pursue temporary work as a way to get their foot in the door for a full-time opportunity with the company. Or some potential agents can be a stay-at-home parent looking for a part-time split shift before and after they home school their kids. A gig or temp employee may have the skills needed on paper, but ensuring their motivations and needs match the requirements of the job is a key initial step.

## Leverage workforce management (WFM) software to match skills to gig

Once you've found one or several gig agents that are the right need for your business, it's time to take a step back and properly add them to your WFM software solution. Add all of their skills in detail to their agent profile so when they are fully trained and it's time for them to start working, you'll be able to get them started immediately with shifts that meet their skills. The detail component is vital to success. Having a skill called "additional language" in your software may be great for identifying multi-lingual agents, but you won't know if they speak Spanish, Mandarin, or a different language. Go the extra mile with properly organizing relevant skills and keeping them up to date. If you don't, you may experience frustration from temp and gig agents about being contacted for work that doesn't actually match their skill set, and they may mistakenly ignore requests for hours that actually do require their skills.

Gig and temp agents can be a great addition to any team. Leverage their unique skills and schedule flexibility to meet the ever-changing needs of your customers.





## Conclusion

We hope you now have a better understanding for how workforce management software can help with improving agent efficiency and morale. The key is to balance agent demands while also catering to their evolving needs. Keep this top of mind at all times to successfully keep your best agents and attract even better ones!



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