

Managing Daily Staffing and Service

The pieces are in place. You gathered and analyzed mounds of historical information to arrive at a call forecast. Then you calculated the number of staff needed by half-hour to meet your center’s speed of answer goals. Finally, you juggled schedules until you arrived at a reasonable mix of efficiency and acceptability. All this planning means that you should have the “just right” staff in place every half-hour to match the workforce to the workload. But you know what they say about the best laid plans...

This article will outline the steps of tracking call center performance within the day to ensure that the plan is actually working based on the realities of the day.

First Things First

The last four articles in this series have outlined how to get to a schedule requirement by half-hour. Once the forecast is done and schedules have been assigned, the next step of the process is to manage the daily schedules to ensure service levels are being met half-hour by half-hour.

The Real-Time Tracking Process

There are three steps in the daily performance tracking process:

- Step 1: Tracking
- Step 2: Communications
- Step 3: Reaction

Tracking and Analysis

Tracking performance within the day means tracking the three elements that affect service: call volume, average handle time (AHT), and staffing levels.

Let’s take a look at how a variation in any one of these components might affect net staffing and service. For example, what if staff adhered to schedule and the call volume forecast was right on target, but calls took 30 seconds longer to handle than planned?

| Time | Call Volume | Forecast AHT | Forecast Staff | Actual Calls | Actual AHT | Required Staff | Net Staff |
|------|-------------|--------------|----------------|--------------|------------|----------------|-----------|
| 6:00 | 280 | 320 | 56 | 280 | 350 | 61 | - 5 |
| 6:30 | 310 | 320 | 62 | 310 | 350 | 68 | - 6 |
| 7:00 | 350 | 320 | 69 | 350 | 350 | 76 | - 7 |
| 7:30 | 380 | 320 | 75 | 380 | 350 | 82 | - 7 |
| 8:00 | 420 | 320 | 82 | 420 | 350 | 90 | - 8 |
| 8:30 | 450 | 320 | 88 | 450 | 350 | 96 | - 8 |

It's easy to imagine a scenario where calls simply take longer to handle than planned. Perhaps the computer system is slow today, or a different format for the billing statement causes an extra question per call. Or perhaps this is the week a new hire class comes on the phones and their longer handle times drive up the average from 320 seconds to 350 seconds.

With this longer handle time as the only variation, staff requirements are affected significantly. In the above example, staffing at 8:00 would need to be adjusted from 82 to 90 staff in order to meet an 80% in 20 seconds service goal. If staffing is not adjusted, the service level will drop to only 6% of calls answered in 20 seconds.

Of course, things might go the opposite direction and workload could be less than forecast. Consider the effect on staffing requirements and service level if the marketing campaign doesn't go as well as expected and call volume is 10% lower than planned.

| Time | Call Volume | Forecast AHT | Forecast Staff | Actual Calls | Actual AHT | Required Staff | Net Staff |
|-------------|--------------------|---------------------|-----------------------|---------------------|-------------------|-----------------------|------------------|
| 6:00 | 280 | 320 | 56 | 252 | 320 | 51 | + 5 |
| 6:30 | 310 | 320 | 62 | 279 | 320 | 56 | + 6 |
| 7:00 | 350 | 320 | 69 | 315 | 320 | 63 | + 6 |
| 7:30 | 380 | 320 | 75 | 342 | 320 | 68 | + 7 |
| 8:00 | 420 | 320 | 82 | 378 | 320 | 75 | + 7 |
| 8:30 | 450 | 320 | 88 | 405 | 320 | 80 | + 8 |

This time at 8:00, only 75 staff will be needed instead of the 82 that are scheduled to work. With everyone on the phones, service level will be 98% in 20 seconds. And while that's great from a service perspective, the overstaffing represents an unnecessary expense.

Tracking Schedule Adherence

Since one of the three factors to track by half-hour is staffing, a critical piece of the daily management plan is tracking and managing schedule adherence. You'll want to match up real-time status and work state information from the ACD against planned schedules and daily schedule exceptions to effectively track whether staff members are doing what they're supposed to be doing.

Historical information about adherence and compliance is useful, but what's really needed in an intra-day environment is real-time adherence information. This can be achieved by walking around and checking filled seats or can be done quite effectively by a workforce management system. These real-time adherence systems can take real-time status messages from the ACD and compare to an agent's work schedule for the day. Any variations that exceed user-set thresholds are reported immediately.

For example, suppose Rachel's supervisor has set a five-minute "grace period" for getting back from breaks and lunches. Rachel is scheduled for a break from 10:30 – 10:45. As long as Rachel is back by 10:50, nothing is reported. But at 10:51, if Rachel isn't logged back in and available, her name pops up on screen as out of adherence. While these tools may be viewed as "Big Brother" or "Watchdog Technologies" by some, they can be an effective way to make sure the third component of the half-hourly puzzle (staffing) stays on track.

The Real-Time Picture

It's important to track the three components of call volume, handle time, and staffing levels throughout the day to see what the impact will be on net staffing. You'll want to start early in the day and watch these numbers to see if any significant patterns are developing. As soon as you spot a trend that seems to be consistent, it's time to reforecast based on the new numbers and predict what net staffing will be as a result for the remainder of the day. If you catch it in time, you can fix it before it's too late.

While all three numbers should be tracked against one another and used to calculate net staffing, there are single numbers of half-hourly performance that may provide a quicker look at whether or not you're in trouble. These measures of call center performance can indicate if all is well or about to get out of hand.

For this snapshot of performance, some call centers use a measure of the number of calls in queue. They may set a threshold so that as soon as a certain number of waiting calls exist in the queue, a reactive process occurs. Others use the age or length of the oldest call in queue and when that wait time exceeds a defined limit, a reaction is imminent. Both of these are true real-time measures and represent a snapshot in time.

The question at hand is whether these are the measures that should be used to actually direct the real-time reaction process. It is our opinion that while these two measures are useful as warning signals, using them to initiate adjustments may be ill advised.

Think instead of setting and meeting service objectives as one half-hour race rather than six five-minute sprints. While an exceedingly high number of calls in queue at any given time might be alarming, it is likely that this number may go back to normal within five or ten minutes as breaks overlap or the natural ebb and flow of random calls happens. You should evaluate carefully before using these real-time measures to drive changes and adjustments.

So what is the single best indicator of performance and service if not those real-time snapshots? Actually, service level or average speed of answer (ASA) for the half-hour is not only the number that should represent the day's service picture, but should also be the measure used in each half-hour to drive adjustments and reaction strategies.

Communications Strategies

Once the numbers indicate that overstaffing or understaffing is happening, the next step is to communicate the problem. Developing a communications strategy involves deciding what to communicate and who should be in the communications loop.

It is likely that the workforce planning specialist or team will be the first to know there is a problem. This group may communicate directly with staff for the necessary adjustments, or may relay the information by team or by supervisor where changes are needed. This communication may begin as soon as there are warning indicators in order to provide a “heads up” about coming changes, or may not occur until it is time to actually make the adjustments.

Reaction Options

It’s important to have a reaction plan in your back pocket for situations that require just a little tweaking as well as major adjustments. You should always know your options whether you need to add or subtract two staff or twenty.

Selecting a strategy depends upon answers to the following questions:

- How severe is the problem?
- What is the effect on service level to customers?
- Can you fix the cause rather than react?
- How long will the problem last?
- What are the options from easiest to hardest?
- What will each adjustment cost in terms of dollars, resources, and effort?

Common staffing reaction strategies for understaffing include:

- Have supervisors or other staff take calls
- Delay meetings or training
- Eliminate optional call content
- Engage other qualified staff or outsource

Likewise, understaffing can also be addressed by making technology changes such as:

- Re-routing calls to other sites or groups
- Adjusting delay announcements
- Changing ring delay settings
- Adjusting trunks
- Invoking other technologies such as IVR or callback messaging

As seen in an earlier example, sometimes the adjustments need to go the other way. In cases where overstaffing is apparent, the following reaction strategies might be used:

- Do impromptu training

- Schedule team meetings
- Catch up on paperwork
- Make proactive outbound calls
- Offer time off without pay

Conclusion

Once the forecast is in place, staff calculations are complete, and staff schedules are assigned, there's daily work to be done in the workforce management process. Tracking the half-hourly components of call volume, handle time, and staffing levels will provide you the information you need to communicate status and make necessary changes to ensure service goals are consistently met. The key is having a systematic process in place to track the information so there's sufficient time to react to make a difference for the day.

Next Steps

In this article series, we've covered the entire workforce management process. These steps are:

1. Forecast workload
2. Calculate staff requirements
3. Create staff schedules
4. Track call center performance

The articles have outlined the "how-to" steps of performing each phase of the process. And while all these steps can be done manually, there's a point at which automating the process with a workforce management system is a must. In the final article in this series, we'll discuss workforce management automation, including qualification criteria, questions to ask the workforce management vendors, and how to budget for the process in terms of dollars and resources. Stay tuned!

About the Author....

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