

After satisfactory completion of the three online tests, the final step in the certification process is submission of a project. Listed below are certification project expectations and competencies as well as all approved projects. Any project on this list requires no further approval from SWPP. Alternative projects do require approval from SWPP.

Once the project is completed, applicants for certification must submit written or electronic documentation to SWPP. Documentation is comprised of a MS-PowerPoint presentation and other supporting documentation such as reports and MS-Excel worksheets.

Findings and final results are presented via conference call to a panel comprised of SWPP members with certification credentials.

Certification Project Expectations and Competencies	
Clarity of Purpose	<ul style="list-style-type: none"> • Understands the broad implication of the situation analysis and problem resolution to overall business objectives • Considers alternative solutions • Identifies solution chosen and plan of action • Defends solution(s) selected
Workforce Management (WFM) Principles	<ul style="list-style-type: none"> • Demonstrates the ability to articulate WFM principles to non-WFM audience • Displays the application of WFM principles to the project problem
Accuracy	<ul style="list-style-type: none"> • Ensures accuracy of application of work force management principles • Ensures accuracy of data and calculations • Ensures accuracy of conclusion
Creativity	<ul style="list-style-type: none"> • Demonstrates creativity in development of solution • Utilizes innovative approaches to achieve desired results and challenges conventional wisdom • Displays creativity in presentation materials
Professionalism	<ul style="list-style-type: none"> • Ensures on-time delivery of materials to committee • Provides professional quality presentation materials • Demonstrates poise under fire during presentation
Presentation Skills	<ul style="list-style-type: none"> • Avoids acronyms and company-specific terms and jargon • Conveys message in set time limit (approximately 20 minutes) • Conveys message clearly and succinctly • Focuses on key points during presentation and does not get sidetracked

Approved Certification Projects	
<p>Project # 1</p> <p>PROCESS IMPROVEMENT</p>	<ul style="list-style-type: none"> • Identify an area of "opportunity" within your call center, e.g., attendance, schedule adherence, productivity, etc. • Contact several peers in your industry or geographic area to identify procedures or technologies that they have put in to place to effectively improve this area. • Use the information gathered to create a presentation for your management team. • Outline the changes proposed, including the necessary costs, change management procedures, and projected return on investment.
<p>Project #2</p> <p>INTRADAY MANAGEMENT</p>	<ul style="list-style-type: none"> • Evaluate the organization's process for receiving schedule exceptions and updating schedules. For example, how is scheduling modified for impromptu meetings? • Answer the following questions: <ul style="list-style-type: none"> ➢ Is it more efficient to accept all exceptions via phone? ➢ Is it more efficient to accept same day exceptions by phone and future exceptions via e-mail or a database? ➢ Is it more efficient to accept all exceptions via e-mail ➢ Is it more efficient to allow exceptions to be processed by the front-line supervisor? ➢ Is it more efficient to allow exceptions to be entered automatically via an IVR, WFM or intranet application? ➢ Is it more efficient to deploy a combination of the scenarios above? • Assess impact by comparing response time and intraday accuracy measures prior to implementing the change and after implementing the new process.
<p>Project #3</p> <p>SERVICE LEVEL VERSUS AVERAGE SPEED OF ANSWER (ASA)</p>	<ul style="list-style-type: none"> • Assume, for example, a daily Service Level objective of 80% of calls answered in 20 seconds as your operational success metric, measured on a daily basis. One of the company executives recently heard that Average Speed of Answer (ASA) is much easier to understand and conveys essentially the same information about daily performance. • Evaluate the two metrics. • Develop an educational overview which shows the impact of each of these call center performance measurements • Determine the most appropriate metric for the organization and cite reasons for the selection.
<p>Project #4</p> <p>AVERAGE HANDLE TIME CHANGE</p>	<ul style="list-style-type: none"> • Assume that senior management revises agent process, resulting in an additional N minutes of handle time to each call. • Determine the impact on service, efficiency, and cost of implementing the survey, using the organization's handle time and call volumes. • Prepare a presentation for senior management that explains the tradeoffs.

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<p>Project #5</p> <p>CREATING SPECIALIZED GROUPS versus UNIVERSAL AGENTS</p>	<p>Analyze the impact of creating specialized agent groups versus the use of universal agents.</p> <p><u>EXAMPLE 1 – Specialized Agent Groups:</u></p> <ul style="list-style-type: none"> • Assume a small 50-agent call center that takes two types of calls - sales and service. The call center receives an equal number of sales and service calls. Currently, agents are trained to take both types of calls. Customers have complained about competency and senior management would like to break the center into two groups – a specialized sales and specialized service group in order to provide better quality of service. • Evaluate breaking a single, cross-trained group into two specialized groups using handle time, call volume and labor costs of one of the organization’s centers. • Determine the potential impact on cost, service, and efficiency. • Describe the impact on both customer and employee satisfaction. <p><u>EXAMPLE 2 – Universal Agents:</u></p> <ul style="list-style-type: none"> • Assume that increases in efficiency and productivity are necessary in the center. Three call-handling groups with somewhat similar skill sets that could potentially be combined into one group of “universal” agents have been identified. • Use call volumes, handle times, and labor costs of the center to compare and contrast the quantitative and qualitative pros and cons of this proposed change. • Make a recommendation with supporting points. • Include the benefits of the increased efficiencies, with other impacts such as occupancy, training costs, and employee and customer satisfaction.
<p>Project #6</p> <p>ANNUAL HIRING PLAN</p>	<ul style="list-style-type: none"> • Assume that the company always wants to have sufficient staff to handle call volume within its service goal. • Develop a hiring plan for the calendar/fiscal year that allows it to accomplish that goal. • Include attrition and attendance assumptions. • Incorporate the length of new hire training, trainer availability, class size constraints, etc. • Consider the impact of newcomer capabilities on AHT and the resulting FTE requirements.

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<p>Project #7</p> <p>DISASTER RECOVERY PLAN</p>	<ul style="list-style-type: none"> • Develop a disaster recovery plan that addresses call routing and call handling for a multi-site operation. • Consider in your plan various types of disasters including those with both short and long term impacts. • Extra credit is given for addressing multiple types of disasters, i.e. not just weather disasters but flu epidemics, cable cuts, service outages, etc. • Ensure that the plan addresses customer and employee communication and demonstrate impact on metrics. • Include emergency routing procedures as well as an internal and external communication process.
<p>Project #8</p> <p>HOURS OF OPERATION</p>	<ul style="list-style-type: none"> • Assume that the center is currently open from 6am – 9pm. Senior management would like to know if these hours are too long or too short as well as input from the workforce planning team about advantages and disadvantages of expanding or reducing the center’s operating hours. • Perform a cost/benefit analysis on increasing and/or decreasing the hours of operation within a site, considering staffing and scheduling issues as well as impact on customer satisfaction and value of calls.
<p>Project #9</p> <p>WORKFORCE MANAGEMENT SYSTEM ACQUISITION</p>	<ul style="list-style-type: none"> • Develop a business case, including return on investment (ROI) that identifies the need for a workforce management system or an enhancement to the current software. • Include in the plan the specific needs based on current call center operations. • Determine how a system/upgrade will benefit various levels of the organization, including the impact on customers, efficiency, and/or cost. • Include in the plan how the system/upgrade will be used and what training and/or reorganization changes would be required to make the best use of it. • Include a cost/benefit analysis with ROI potential.
<p>Project #10</p> <p>FORECASTING ACCURACY</p>	<ul style="list-style-type: none"> • Analyze the forecasting accuracy of one specific work type by half-hour interval over a daily, weekly, and monthly period. • Determine the percent of variation by interval and overall for the day, week, and month for a recent month. • Identify the number of periods that are within 5% and determine the reasons that other periods fall outside that accuracy range. • Develop a plan to improve the accuracy.

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<p>Project #11</p> <p>SCHEDULE EFFICIENCY</p>	<ul style="list-style-type: none"> • Analyze the scheduling efficiency for the call center for a specific work type or for all involved under a skill-based configuration. • Determine the number of staff that the plan predicts over and under the requirement by half-hour interval for each day of a recent month. • Identify those periods that are more than 5% over or under staffed, with particular attention to those times of day or days of week that are consistently off plan. • Working with managers and staff, identify at least two scheduling changes that can be made to improve the match of staff to requirements more consistently.
<p>Project #12</p> <p>SPEED OF ANSWER GOALS</p>	<ul style="list-style-type: none"> • Review the current speed of answer goals the center for each work type. • Analyze the tradeoffs of customer service, occupancy/productivity, and cost. • Communicate to management all the potential impacts of increasing or decreasing the goals. • Reset goals as appropriate to match current business conditions.
<p>Project #13</p> <p>POWER OF ONE EDUCATION</p>	<ul style="list-style-type: none"> • Develop a presentation for your new hire orientation classes and existing agent team meetings that will communicate the "power of one" effectively. • Deliver the training to existing staff and at least one new hire class. • Analyze the average adherence to schedule prior to the classes and after to determine the effectiveness of the training.
<p>Project #14</p> <p>NETWORK/TRUNKING DESIGN</p>	<ul style="list-style-type: none"> • Work with the IT/Telecom/Operations group to identify all trunk groups and call types coming into the call center, along with the current routing plan. • Review the traffic load on each of the trunk groups to determine the appropriate number of available channels to ensure there is an appropriate number to match up to available staff. • Make recommendations for a trunk design that better matches channel availability to workforce, including potential ways to save money on toll-free network costs.
<p>Project #15</p> <p>CAPACITY PLANNING</p>	<ul style="list-style-type: none"> • Compare your company's long range FTE requirements to its real estate availability in order to determine the need for a new site • In the analysis, address the following: <ul style="list-style-type: none"> ➢ Peak volumes, both seasonal and any other business cycles. ➢ Seating methodology. ➢ Shrinkage, especially as it relates to seating methodology. ➢ Technical capacity, i.e., is it possible to add another switch onto the existing one? ➢ Risk analysis, i.e., what happens if you do not make this upgrade to capacity? ➢ Outsourcing possibilities. ➢ Analysis of alternatives. • Conclude with recommendations and supporting documentation.

Approved Certification Projects	
<p>Project #16</p> <p>NON-PHONE CONTACT CHANNEL</p>	<p>Assume senior management wants to add an additional way for customers to communicate with your contact centers. Examples are email or web chat.</p> <ul style="list-style-type: none"> • Identify data sources; collect data for the forecasting process. <ul style="list-style-type: none"> ➤ Calculate contact arrival patterns by day of the week and interval of the day. ➤ Determine the AHT and shrinkage assumptions. ➤ Determine service level goals, the time measurement for the service goals and utilization. ➤ Evaluate operating hours options. ➤ Describe the options for contact delivery, whether employees will be dedicated to the contact type or handle multiple media and evaluate the most effective one for your business. ➤ Include the priority of contact channels. ➤ Evaluate the effectiveness of single-skill versus multi-skill routing, based on your decisions. ➤ Calculate staff workload. • Analyze the impact of the new channel on the existing workforce management system. • Prepare a presentation for senior management that explains the forecast and staffing requirements.
<p>Project #17</p> <p>STAFFING PLAN FOR A NEW CALL GROUP</p>	<p>Prepare an analysis to determine the staffing needs for a new call center group.</p> <ul style="list-style-type: none"> • What details relative to the new call group are provided? <ul style="list-style-type: none"> ➤ Examples are NCO, AHT, service level, hours of operations etc • What details are not provided? <ul style="list-style-type: none"> ➤ What assumptions are made for the missing details? ➤ How are these assumptions derived? ➤ What are the risks for these assumptions? • How long will this group take to start up? • Did you explore multiple opportunities? <ul style="list-style-type: none"> ➤ Examples are a dedicated call group, blending with an existing call group, or overflowing to an existing call group • What are the staffing recommendations?