



2020 SWPP ANNUAL CONFERENCE

The Summit for Workforce Management Excellence

Standards and Strategies for Call Center Staffing

MARCH 30-APRIL 1, 2020

Omni Nashville Hotel • Nashville, Tennessee



Sunday, March 29

1:30-4:30 p.m. – Pre-conference sessions (Separate registration and fees required)

Essentials for Acquiring and Implementing an Automated WFM System: Four Steps to Ensure Successful Purchase and Effective Rollout. Once a contact center operation has reached the size and complexity to need an automated WFM tool, finding and implementing the best option is a daunting task. It requires a thorough needs analysis, research of potential options, building a business case, development of a detailed request for proposal, performing a decision analysis, and managing an implementation project. Consideration of current needs is critical but identification of potential needs for the future is also essential to ensure long-term success.

In other situations, the operation may already have a WFM tool and a replacement project is the challenge. The organization may have found that the current WFM tool simply doesn't meet the needs anymore and a different tool is sought to resolve these inadequacies. In other cases, the change may be a result of decisions on a broader scale. These might include bringing a multisite operation to a single system type, changing out several disparate systems to a suite of contact center products from a single vendor, movement from premise-based to cloud-based technology, or other reasons that can bring a change of capabilities, processes and options.

This session will describe each of the steps in these processes and the most effective ways to ensure success. Attendees are encouraged to bring their situation analyses and experiences to discuss in the session. This is a vendor-neutral session and no comparison of vendor capabilities to one another is included.

or

Teaching WFM Concepts to Frontline Supervisors. This hands-on workshop is designed to help workforce management professionals enlist and incorporate contact center supervisors in carrying out the center's staffing plan. Attendees will develop a plan to help supervisors understand the workforce management process and their role in supporting the overall staffing plan, including how to effectively communicate and coach frontline staff on schedule adherence and the importance of individual contributions to service delivery. Topics include:

- A look at what supervisors need to know about workforce management and staffing tradeoffs
- What the supervisor's roles and responsibilities are
- How to coach for improved schedule adherence
- How to communicate Power of One concepts through interactive activities

All attendees will receive a workbook, along with a copy of the book, *A Supervisor's Guide to Workforce Management*.

or

Developing Your "Power of One" Training and Real-Time Management Playbook. In the contact center, help desk, and tech support world, teaching agents, managers, and other groups about the importance of managing real-time activities is a constant workforce management challenge. Fluctuations in volume, handle time, and availability of personnel change in a moment. Just reacting to these creates additional chaos for the center and, many times, is ineffective due to poor communications, lack of coordination, and timing. Developing a strategy around how we communicate the importance of each person and adherence to schedule is critical. Also, we need to couple this with a real-time access plan that enhances our ability to service customers and effectively plan for both extreme peaks and valleys. In this interactive session, we will explore the framework areas of development necessary to build an effective and efficient plan. We'll also begin work on the development process of your own "Playbook."

Attendees will have interactive training and discussion on the "Power of One" activities and Real Time Access Planning. We'll also have small breakout sessions designed to assist in development of your own playbook. Session attendees will learn about:

- Power of One activities and how to train them
- Customer's expectations in this millennium
- The benefits of access management planning Service level and occupancy optimization
- Essential components of "The Playbook"

If you manage a center, WFM, or have responsibility for the real-time activities in your center, this is a great workshop for you! Get a head start on your "Plan."

2:00-5:00 p.m. – Registration

2:30-3:30 p.m. – Complimentary Pre-conference Session

Roadmap to the SWPP Annual Conference. New to the SWPP conference? Come to this fun and interactive session to hear how to make the most of your time at this event. Review the agenda and learn how these key topics will give you specific takeaways for your organization and help you with business decisions down the road.

3:30-4:30 p.m. – Complimentary Pre-conference Session

Speed Networking. Everyone has heard of Speed Dating. Attend this session for a variation that will help you start off the conference with a bunch of new friends! In our Speed Networking session, you will spend just a few minutes getting to know some of your fellow attendees, and exchange business cards so that you can talk more over the next few days and keep in touch after the conference is over.

Monday, March 30

8:00-9:00 a.m. – Registration & Continental Breakfast

9:00-10:15 a.m. – Welcome & Keynote Address

10:45 a.m.-12:00 p.m. – Workshops

Preparing to Forecast: Decisions and Data for the Planning Process. There are many steps in data review and analysis before the forecasting process begins. In this seminar, you will learn about the up-front essentials of forecasting workload. Hear about the sources of input data and how to decide which best represents future needs. Learn about agent work state activity and techniques to ensure you have predictive AHT data. Practice identifying and adjusting for data aberrations and other considerations for data cleanup before it enters the forecasting process. You will also hear about forecasting models and how to choose the one the best represents your business and calling patterns.

Challenges of Setting Up WFM in a Back Office Group in a Front Office World. Looking to apply the benefits of WFM in the front office to the back office, but faced with limited access to data and no connectivity to WFM systems? Come on this journey to learn how USAA approached the building of the workforce management structure to provide a value-added product and service for their business partners in back office operations. Hear first-hand experiences of what has worked well, challenges experienced, and lessons learned as they built the WFM framework for the back office world.

From Spreadsheets to Workforce Management: A Story of Growth, Transformation, and Innovation. Join this session to hear from MTD, a company implementing workforce management for the first time. MTD transformed their business by using workforce management to create efficient scheduling and staffing to track the most important KPIs. Not only did MTD look to remove manual work from forecasting, they wanted to empower their employees to have visibility into their schedules and take responsibility for their work as well as assist their customers via additional channels (chat, social, etc.). But how do you execute a solution and implement its use culturally within your business? Join us to find out.

Leveraging the Synergies between Quality Assurance (QA) and Workforce Management (WFM). QA and WFM already have a strong relationship. Find out more about the benefits that can be realized with a fresh look at QA and WFM working together including reducing contacts and customer pain-points through root cause analysis, sharing trends and the call studies that can help explain why, outlier management, as well as the role of speech analytics and its impact on employee experience. Learn about the new approach that was taken at Hagerty and the results it has yielded.

So You Got the Approval for a Workforce Management Department...Now What? What do you do once you have your green light to start your workforce department? We will touch on everything from getting the right team members, establishing credibility, gaining promoters, understanding the business, and some examples of how to show the ROI of the great work you will have completed. As our industry continues to gain positive momentum on the value of what workforce brings to the table, more and more companies will need an internal workforce management resource to navigate the pitfalls.

Meet the Board SWPP Meet. Join the SWPP Board of Advisors for a SWPP Meet, as they present issues and solutions in today's call center. You won't want to miss this opportunity to network with your workforce management peers and discuss your toughest workforce management problems. It's also a great time to meet the Board members and find out more about this group of industry leaders that directs SWPP's activities and programs.

Foundations for Building a Strong Real-Time Adherence (RTA) Team. In this session we will discuss some of the foundational elements needed to build a strong RTA team. We will focus on building a WFM skillset in your RTA team from the ground up, establishing clarity of purpose through well-defined roles and responsibilities, empowering the RTA team to execute by removing barriers and ambiguity, and addressing opportunities for improvement through open communication and feedback.

Empower Your Agents: How to Give Your Agents Schedule Flexibility and Still Keep Your Job. Schedule flexibility is more than just split shifts or half-days, it needs to be personal to your agents. Flexibility looks different to the recently-graduated, single parent, or about-to-retire agents. But how can you give agents the work/life balance they desire and still meet service levels? Come hear how World Travel Holdings is using their attendance policy (“The Marketplace”) to enable their agents to have control over their schedules and still meet the customer demands.

WFM: The New Frontier. Contact center leaders are under constant pressure today to create value, and the need to innovate is greater than ever. There have been amazing advances in digitization, robotics, and real-time decisions — each representing a convergence in technology coming together to improve delivery and effective processes, while sticking to traditional prescriptions. In this presentation, we will take you through a journey of WFM transformation, through process re-imagined, industry-leading tools, and optimization to meet the customer expectation and improve colleague experience.

12:00-1:30 p.m. – Luncheon & WFM Professional of the Year Award

1:30-2:45 p.m. – Workshops

Forecasting Basics: Predicting for Months, Weeks, Days, and Intervals. In this seminar, you will learn the step-by-step process of applying Time Series Analysis to predict future workload. Learn how to identify trend rates and seasonality patterns for a monthly call forecast. After the monthly forecast is in place, the next step in the planning process is to break down the predictions to weekly, daily, and interval numbers. Hear the process and calculations to use to distribute a monthly workload all the way down into intervals for scheduling. Finally, take a look at some right and wrong ways to review forecast accuracy to fine-tune future predictions.

Back Office is Not the Back Alley: Basics of Back Office WFM for the Contact Center WFM Pro. You never know what you'll find in a dark back alley, but put away your fears — the Back Office is not a dangerous back alley of pitfalls, complication, and complexity if you know how to approach it. Come on a journey to hear about the experience of moving from an organization with almost no back office to a 60% back office role. Be prepared to ask questions, share tricks, and learn how to plan, staff, and schedule to manage those non-inbound phone widgets.

Lessons Learned from Introducing WFM into a Contact Center. This session will address the challenges and key decisions involved with introducing WFM into a contact center for the first time. Key factors to be considered include sources of data collection, data analysis, communication strategies, and management engagement. We will share first-hand experiences of what has worked well, mistakes we've made, and lessons learned along the way.

The Missing Link Between Finance and WFM. Workforce management has one of the largest impacts on the finances of your contact center. However, in many cases, there is not a strong level of communication or understanding between Finance and WFM departments. Learn strategies on how to bridge the gap between finance and WFM to create a true partnership that can help ease the burden for both departments and provide a stronger foundation for informed business decisions.

Workforce Management Certification Workshop. This workshop provides attendees with information on the certification preparation and process to attain the title of Certified Workforce Planning Professional (CWPP). What is CWPP Certification from SWPP all about? What will it do for you in the workforce management field? What are the requirements for certification? How do you prepare? These and other questions are answered by a panel of workforce management professionals who have already achieved the CWPP designation.

Can We Really Give Everyone Time Off on Holidays? Has your organization struggled with the best way to offer premium time off for all your front-line employees? This session is a great opportunity to learn creative ways in offering premium time off to all of your employees while still meeting your customer demand. Attend this session to also learn creative ways in offering last-minute time off when capacity allows or allowing your front line employees to plan for life events 13 months ahead of time.

Structuring an Incentive Plan for Agents. Come to this session to hear about incentive plans for agents developed or managed by workforce management. This panel will discuss how companies recognized the need for an incentive structure through gamification and technology and executed the plan on a WFM budget that helped drive agent behavior and satisfied the stakeholders.

Getting More Out of Your Service Level Thresholds. Setting service level targets that directly reflect your business needs is very important to every organization. By understanding what goes into a properly aligned service target, organizations can better utilize their resources to meet customer expectations. The challenge? Doing so while not impacting budget, employee morale, or satisfaction scores. Come join Green Shield Canada as they share their case study examining the outcome of measuring for success. By sharing considerations to be mindful of, the impact of downstream management and case study results, attendees will be better equipped to set service agreements that reflect measures of great customer support and efficiency.

2:45-3:45 p.m. – Afternoon Break

3:45-5:00 p.m. – Workshops

Essentials of Staffing: Models and Calculations for Contact Center Staff. Managing a contact center means managing by the numbers and the most important number is the right number of staff in seats at the right time. Learn the essentials of calculating staff requirements, including how to assemble workload and apply Erlang techniques to determine staffing to meet service goals. In addition to staffing for incoming telephone calls, learn how to calculate workload and apply the proper staffing techniques for outbound calling, email, and chat contacts.

Extending Workforce Management Support to the Back Office. The only thing consistent about the businesses we support is change. Workforce management teams are often asked to support the ever-changing environments of the business. In this session, you will hear how several organizations have tackled the movement of WFM from just inbound call handling to multi-media contacts and now to the back office environment. Hear tips and techniques to make this a more successful and smooth transition.

Innovative Ways to Schedule. Ever wonder what other companies have done to get the most out of their schedules using creative scheduling and flexibility? Come join this interactive panel where we share our success/failures, best practices, and tips and tricks for you to put your ideas into place. You will also have the opportunity to share some of your own creative options that you have implemented and your experiences. The panel will also look at how labor laws affect different states, nations, and geographies and how to effectively manage these challenges.

Setting Up Third Party Support in a Workforce Management Team. Do you have a desire to do more for your business partners, yet your WFM team is bogged down with day-to-day tasks? Come listen to how USAA's WFM team partially outsourced their Workforce Management daily tasks, to create capacity for expanding their services across their organization. Attend this session to learn details about their journey to partially outsourcing Intraday (real-time monitoring) and scheduling procedures. Attendees will takeaway tips on how obstacles were overcome, lessons learned, gains from the venture, and hear how the team is continuing to excel and advance today.

Workforce Management Certification Practice “Bee.” Play this fun, interactive game to test your knowledge and get a flavor for the questions included in the Certified Workforce Planning Professional (CWPP) exams. Attend this session to see what you need to know in order to be successful in the pursuit of CWPP certification through SWPP.

The Padawan (Beginners) Guide to Adherence Management and Intraday Monitoring. Come join us in this interactive beginner's guide to Adherence Management and Intraday Monitoring. You will learn some great tips and tricks to help manage your contact center more effectively. There is not an “Easy” button in doing what we do, but let's talk about how we can make things a little easier.

Generation What? Boomers, Xers, Millennials, and Gen Z. Today's contact center can feel like an awkward Thanksgiving with lots of age-based tension, or it can be a powerhouse driven by diversity of life experience. But to understand how to unleash the potential, and extinguish the fuse, you have to know who each generation is, and the uniqueness associated with its working style. In this session, we will discuss what makes each generation different and learn about the working strengths, traits, and cohort motivators for each generation as well as specific challenges.

Forecasting and Scheduling for Alternate Channels. Until a few years ago, contact centers were focused on handling inbound telephone calls from customers. Today, customers communicate with agents through a variety of channels, and many contact centers have been transformed into multi-channel or omni-channel operations. Customers have the choice of contacting companies by telephone, email, paper mail, fax, web chat, social media, and in-person. The increasing number of communication channels, however, poses a challenge for the workforce planner in providing the right number of appropriately skilled employees at all times for all channels throughout the day. Come to this session to hear how different areas of Navy Federal have learned to adapt in this new environment.

Where Are We Going? Looking Into the Future of the Industry. Will bots be doing WFM in the future? Will we have Uber agents working from tablets and mobile devices while they catch Pokémon in between calls? Technology is changing seemingly at the speed of light and what do you need to be prepared for and thinking about to stay one step ahead, not just in WFM, but in partnering with an ever-changing workforce. A panel of long-time industry veterans shares not only what they see in our future, but how they maintained “fresh space” to keep an eye on the prize while navigating the sea of change.

5:00-7:00 p.m. – Networking Reception

Tuesday, March 31

7:45-9:15 a.m. – Breakfast

8:00-9:00 a.m. – Behind Closed Doors with the Sponsors

9:15-10:30 a.m. – Workshops

Staffing Tradeoffs: Achieving a Balance of Service, Occupancy, and Cost. After determining base staff requirements, it is critical to review all the tradeoffs that impact contact center stakeholders. Learn about how callers are impacted by staffing decisions that drive speed of answer and quality of service. Review how staffing levels impact frontline staff in terms of productivity or occupancy. Finally, see how staffing levels and telecommunications factors affect revenues and costs. Hear about how one person can make an impact on service, occupancy, and cost, as well as the factors to consider when making decisions about agent group size, multi-skilling, or consolidation of sites or groups.

WFM in Back Office and Blended Environments. Back office is the often-forgotten piece of the WFM puzzle and if we are honest, one of the more challenging pieces. In this session, you will learn how your WFM team can support back office and blended teams by integrating scheduling, forecasting, and capacity planning. Gain insights into overcoming the challenges associated with capturing accurate volumes, determining handle times, and gathering shrinkage data. Hear ideas on gaining employee and leadership buy-in, maintaining strong working relationships, and introducing WFM practices like PTO and shift bids into these environments.

Breaking Down Silos. Why can't we all just get along? It can get stressful when communication breaks down and different departments look through different lenses. The reality is we are most often trying to get to the same result. This session brings some of the contact center groups together for a frank discussion of what we can do to increase communication and stay on the same side of the fence. Industry experts share how they get along and how increased understanding is paramount in service to delivering in every arena of the contact center. Come and hear their experience in being successful "partners" through the evolution of our industry.

Don't Let Your SOUP Leave You in a STEW. SOUP (Service Level, Occupancy, Utilization, and Productivity) can often leave you in a STEW (Same Talk Every Week) situation. It shouldn't. Find out exact definitions, but more important, how to explain them in a way that makes sense and yields dollars! Write your recipe by finding just the ingredients that work for your organization. In this session, you'll learn exact definitions of each tenant of measurement. We will look at different ways service level is measured and the relationship between it and occupancy. Productivity for front line and back office employees will also be covered. Finally, we will examine the "secret ingredient" — shrinkage — and leave with a plan to satisfy even the most finicky finance and operations managers.

Teaching the Power of One Throughout the Contact Center. Every contact center needs a Power of One education plan. In this session you will learn how to communicate the impact of staffing decisions on service, occupancy, and cost for various sizes of centers and agent groups. Hear about creative ways to present the information in traditional ways, as well as how to utilize Power of One games and activities to reinforce concepts to show agents how important they are — that one person really does make a difference!

Outsourcing Challenges Examined. This session focuses on outsourcing relationships from a workforce management point of view. Whether you are currently outsourcing or just thinking about it, be sure to join this interactive panel discussion and hear from industry experts with a wide range of outsourcing experience. Key topics will include forecasting, scheduling, and real time management.

Creative Scheduling – Overcoming Operational Limitations. The customer behaviors that come from unique business models require equally unique scheduling strategies. Not every company has a robust scheduling tool, an excess of available space, or the ability to utilize flexible agent bid scheduling. Workforce management at doTERRA International has created scheduling strategies to combat workload complexities for 20+ languages and 30+ countries. These strategies enable closer alignment of staff and workload while minimizing costs.

Getting More From Excel: Leveraging Pivot Tables and Charts. Storing data in Excel is most helpful when you can easily organize and analyze it based on variables that you want to look at. We will walk through using functions and formulas as well as creating pivot tables and charts. Learn to format and filter information and create calculated fields. In addition, we will provide examples using workforce data. A sample dataset and step-by-step guide for creating pivot tables and charts in Microsoft Office 365 version of Excel will be provided for attendees. Attendees will want to already have a basic understanding of formulas, formatting, filtering, and chart creation. Please download the session materials from the website and bring your laptop for a more interactive experience.

The A,B,C's and 1,2,3's of Purchasing a Workforce Management System.

Come hear about EmployBridge's steps taken to ensure their purchase of the right WFM system for their organization. Gain insight into the RFI process and what is entailed in making that final selection.

10:45 a.m.-12:00 p.m. – Workshops

Scheduling Strategies: Definitions and Decisions for Successful Schedules. A successful schedule plan involves many decisions on the front end that can impact the long-term and short-term effectiveness of the work shifts. In this session, learn about the fundamental concepts of calculating and applying shrinkage to arrive at schedule requirements, along with considerations of defining schedule components. Hear about how to decide on optimal schedule horizon, shift definitions, and schedule constraints, as well as some of the best strategies for optimizing schedule coverage and minimizing cost.

Back Office — The Rest of the Story Quantified. You have a back office plan but how do you really know you have true workload "demand" captured? In this session, we will look at ways to create an all-encompassing forecast, complete with a bottom-up shrinkage plan and a way to include any task. The outcome is one that can be owned by the agents and truly is a cross-functional winning team plan. Walk through a real-life example of days in the trenches doing a time study and hear how to build workloads for items that may not sit on your switch or in your CRM. A productivity plan diagram you can mold into one for your own contact center will be shared. Finally, you'll walk away with a way to tailor a plan for success for your company that fits the uniqueness of your organization.

How to be a More Influential Contact Center Leader. Do you ever feel like your ideas go unheard and your perspective on improving the contact center is undervalued? If so, you're not alone. Despite the importance of the contact center, many of these professionals struggle to gain influence throughout the business. Whether it's marketing, sales, IT, or another division, there is a tremendous opportunity for what happens in the contact center to better inform company decisions. In this interactive session, contact center expert Justin Robbins will guide attendees in how business leaders view the contact center, how their role as WFM professionals can gain them more influence, and how to navigate the common challenges that contact center employees face when building their influence.

Going Global with Uber: A Case Study. Have you ever wondered what the secret to a successful customer support network is? And how you scale that globally or even across various locations in one country? This is Uber's story on global support expansion, providing insights and best practices on managing a truly multicultural, multilingual footprint with four regions, 10 centers of excellence, 44+ BPO sites, and multiple modalities. The session will be dedicated to the methodology that Uber uses to sustain high performance standards while constantly growing and evolving. If you are expanding into a global WFM team or even if you have ever had to blend two or more WFM teams in different locations with different rules and policies, this is an important session to attend.

The Benefits of a Solid Partnership between WFM & HR. Finding great talent and creating a culture that retains all colleagues is everyone's business! The WFM team at Accor's North American Global Reservation Centre is fully engaged in this collaborative effort with their Talent & Culture team and this contributed to having the right number of agents to meet business needs. Come hear their story and take away new ideas to share with your contact center team.

All In – Diversity and Inclusion for the WFM Professional. To complete any puzzle (including staffing), you have to use all the pieces. Diversity issues and the business case for inclusion may not always be at the forefront of thought for our field, however WFM can have a significant role in the success of any Diversity and Inclusion (D&I) item. How diversity issues may arise and impact you in contact center leadership, and workforce management is something you need to know. In this session, we will discuss moving beyond categories to find how to empower each puzzle piece to bring value. This is not just about D&I as a program, but as a smart business practice to maximize your potential workforce.

The Survey (and You!) Said... Top Workforce Management Trends. What's hot and what's not in workforce planning and management? Join us in this interactive session that showcases the survey results and best practices from the Society of Workforce Planning Professionals (SWPP). Each quarter SWPP surveys the workforce management community on critical topics. Hear the results of some of the most interesting surveys from the past on topics from Staffing to Schedule Adherence to Paid Time Off (PTO) and more. We will also open up the discussion to encourage attendees to share your own experiences as well. See the trends in our industry today from SWPP members -- and your own organization!

Making Use of your WFM System: Flex Schedules. DISH Network has a contact center workforce of 7,000+ agents scheduled by one small centralized workforce team. We hear time and time again that agents want more flexible schedules, but with such mass to schedule, it becomes difficult to make exceptions. The DISH team came up with a creative idea to utilize the overtime functionality of their WFM system for select agents to create schedules from. Through this new practice, they were able to utilize existing functionality, drastically increase employee engagement and empowerment with our agents, and reduce workload from the Scheduling team, all while exactly meeting the required demand.

Leave the Toxicity Behind: Overcoming Negativity in the Contact Center. Are you tired of always being the “NO” person? Is your relationship with your agents contentious at best? In this session, WFM Evangelist Dave Hoekstra from Calabrio will discuss ways to smooth out the relationship with employees while still maintaining KPIs. Whether it is being more flexible around scheduling, making sure agents understand the “why” behind the decision, or just helping the team have a better understanding of the process, you will leave with a notebook full of ideas to implement back home!

12:00-1:30 p.m. – Luncheon & WFM Jeopardy

1:30-2:45 p.m. – Workshops

Managing Schedule Adherence: Creating an In-Place and On-Time Culture. An accurate forecast and perfectly constructed schedules don't mean much if the frontline staff are not following the plan. In this session, you will learn techniques to measure adherence and quantify the problem of schedule non-adherence. See how common principles of performance management can be applied to identify reasons for non-adherence and what you can do to change adherence behaviors. Hear how some centers have created an adherence culture that works.

How Change Management Can Increase the Success of Workforce Management and Business Partner Relationships. Simple and effective change management plans are at the heart of Nationwide's success in deploying workforce management tools that support over 4,000 employees. Join us for stories of success and fast fails through 12 years of workforce deliveries. Learn about tested tactics and tools for overcoming resistance to change and how to manage setbacks through implementation.

Reporting – It's Not Just About the Numbers. Every day you send out reports. AHT volume, shrinkage, performance — by day, by week, by interval, by month, by second, over and over — but what do they mean? Come to this session to learn to investigate an often-overlooked part of what many WFM teams do on a day-to-day basis — reporting. Let's take a hard look at KPIs that don't always mean “Keep Performing Impeccably” and might mean “Kill Potential Improvement.” We need to make sure we aren't focusing on INFO numbers (Irrelevant Numbers for Operations) and walk away with the ability to meaningfully partner in service to delivering for customers and agents! We will dive deep into ways to share not just numbers, but analysis that drives customer delight by sharing not just the “what” but the “why.”

Staffing Wars: The Rise of Scheduler. Is the work-force strong with you, or at least your scheduling? Schedule alignment is a constant battle between the dark and light side of business need and agent preference, a new hope has arisen! When the warriors of truth and justice serving the all-powerful work-force seem overwhelmed by the unending demands placed on the resources, there is a new light dawning. Scheduling in the modern contact center may not literally be as complicated as hitting the one shot that destroys the Death Star while avoiding a certain breath-masked villain, but the ever-changing complexities certainly make it feel that way. In this session, hear how to build a successful culture and processes around staffing alignment in contact centers of all sizes and channels. Come ready to share and learn as we talk through how to best move through the ever-changing world of scheduling. The work-force will be with you, always.

WFM Team: From New to Evolving – A Story of Adaptation & Growth. Are you starting a new WFM Team? Rebuilding or remodeling your group? Then join us for a lesson-packed story about how CNA Insurance went from three workforce analysts sitting in three different departments to an eight-person powerhouse Center of Excellence over the course of four years. With a focus on deploying WFM to the back office, implementing new technology, and a growing partnership through emotional intelligence, we'll share the lessons we've learned along the way and our vision for the future.

My Button Says “Less Than 200 Agents:” Challenges and Benefits of Small Contact Centers. While some contact centers have thousands of employees and multiple locations, many have just one location and less than 200 agents. There are specific challenges and benefits that are unique to the smaller centers. We will discuss some of these issues, and some best practices in solving them. Come prepared with your own questions or best practices.

The Great Debate. There are two sides to every story — and we're going to explore them all! This lively session will showcase debates on several different workforce management issues, including whether to enter after-the-fact exceptions, centralized vs. decentralized workforce management teams, service level vs. ASA as a service goal, and more. Come and offer your opinion into the mix!

Setting Strategic Goals for Workforce Management. Just like the organization as a whole and the contact center within it, the Workforce Management department needs to have strategic goals that define the direction for the team. Clearly set overall goals make short-term decisions easier and performance more consistent. In this session, you will learn: the 10 most common goals; definitions and applications; implications of different calculations; tradeoffs when goals create conflicts; and the essentials of creating a strategic plan.

Workforce Management for Messaging Channels. Messaging is emerging as a new and preferred channel for new gen companies to provide technical support and customer care. It leverages platforms such as WhatsApp, WeChat, and Apple Business Chat for customers on these platforms. Come to this session to learn the differences between messaging and Chat channels, synchronous vs. asynchronous channels, as well as the nuances in planning, staffing, and intraday support for these channels.

2:45-3:45 p.m. – Ice Cream Social with the Sponsors

3:45-5:00 p.m. – Workshops

Managing Daily Service: An Intra-Day Plan to Keep Staffing and Service on Track. Achieving intra-day success involves a process of monitoring, tracking, assessing, and acting to ensure staffing levels stay intact to deliver service regardless of the events of the day. In this session, you will learn about ways to monitor and track contact volume, handle time, and staffing throughout the day in time to make changes as needed to impact service. Hear about communications and reaction strategies to affect both under-staffing and over-staffing with minimal disruption and maximum coverage.

Less is More – Simple Change, BIG Impact. In this session, we will present two case studies that showcase how even small changes to processes can have big impacts in the Contact Center. The first case study will outline how we were able to streamline the attendance and time-off request process, saving significant time and effort for the WFM and Operations teams. For the second case study, we will discuss using WFM software to automate the shift bid process for agents. For each example, we will walk through the steps we took to identify opportunities, research and identify solutions, and gain buy-in from our partners in Operations. You will also learn how these changes empowered agents and supervisors with more self-service capabilities and helped reduce WFM involvement in personnel matters.

Where Do Your Goals Come From? While there is no “industry standard” for many of the metrics that we measure, our management teams are always asking us what other companies are doing. Come to this session ready to share your key metrics — and how they were determined — and hear the same information from the other attendees as well.

Remote Working in a 24x7 Global Team. In this session, we will explore staffing a 24x7 Global Team with a “follow the sun” and remote-working employee environment. Hear how a hybrid approach to weekend staff coverage using 4x10 schedules and remote work options for less desirable schedules boosted employee morale. Using a “follow the sun” methodology ensures team members are not required to work “graveyard” or less desirable schedules that typically have higher turnover and are difficult to fill.

Integrating WFM into a Retail Operation. Nowadays, integrating workforce management into a retail operation is a reality, due to the high competition and its constant evolution in the market. Organizations are focused on cost-efficient models and at the same time, ensuring high-quality customer experience. This session is designed for all WFM professionals interested in delving into a WFM implementation for a non-traditional business, as well as adapting a standard framework and scaling it. The presentation will be focused on setting up the foundations for a successful rollout, a roadmap of priorities, the key players, and the importance of a strategic approach over the tactical one.

Selling Workforce Topics to the Executive Level. This discussion will focus on how to effectively communicate and sell workforce needs to your executive team. We will break down how to identify the motivations of your audience and tailor detailed information to their level. If you have a particular topic you have had trouble getting buy-in for — join us! This will be a presentation full of audience participation.

Ask The Workforce Wizard. This session is your chance to ask our panel of experts anything WFM! This interactive panel will answer questions submitted and chosen by conference attendees. If you have a question or an issue that has been a challenge to your team, bring your question to this session! The audience will also get a chance to give some input. This session will be dynamic and informative, but the topics covered will be chosen by you and your peers at the event.

6:30-9:30 p.m. – Evening Event at Nashville Underground

Wednesday, April 1

7:45-8:45 a.m. – Breakfast

8:45-10:00 a.m. – Workshops

Signs of Success: Metrics and Measures of WFM Performance. Almost every contact center employee has a performance scorecard, outlining expected levels of performance in many different areas. The workforce management team is no exception. While the tasks may vary from center to center depending on size and functional design, there are common ways to define metrics that point to good performance and a job well done. Learn about the four components of WFM success, along with different ways to measure and report the numbers. See measurement case studies, along with best practices for defining WFM metrics.

60 Ideas in 60 Minutes – WFM Tips & Techniques from Real-Life Experiences. This fast-paced session with a panel of your WFM peers will have you writing furiously as you try to capture an idea a minute on paper! This format will give you some last minute tips to take home and implement immediately – if you can catch them all!

Change Management – From Migraine to Movement. Schedule changes, forecast changes, changes in call routing, headset count changes, lunch order changes... regardless of size or scope, workforce management is usually at the forefront of change in every contact center. And simply put, change management is tough! When faced with change, people can have varying degrees of reaction to it. Addressing the emotional impacts of change can help gain buy-in and assist in creating smoother transitions cross-departmentally. Come to this session to hear about change management and its emotional effects, and brainstorm tools and resources that can help in your organization.

Make Your Own Path: Following a Career in Workforce Management and Beyond. Have you ever wondered how you go from being where you are to where you want to be? Workforce management and planning is a progressive profession within an industry. In this session, we will look at career pathing and some of the means of moving up to or through your career journey. No two people are alike. Come prepared to share, grow, and learn.

How Do You Measure WFM Success? There are so many different metrics that come out of our workforce management efforts. But which ones should we use to measure our success as a workforce management team? Come to this panel session to hear how different organizations measure the success of their teams and demonstrate their accountability to the rest of the company.

The Latest Thinking in Contact Center Forecasting and Scheduling. This session explores some of the latest thinking in contact center forecasting and Scheduling. It looks at some of the latest techniques to match contact center demand with the best shift patterns. We will explore the latest academic research as well as practical techniques. Leading-edge forecasting techniques will be revealed as well as the latest scheduling algorithms. Topics discussed will include the best shift patterns to use in the contact center, calculating and improving schedule efficiency, how to get staff on board, dealing with time-off requests as well as exploring forecasting and scheduling mistakes.

How to Build a Capacity Plan with Limited Information. Have you been tasked with building a capacity plan from scratch? Have you ever been faced with the challenge of developing a long-range plan with limited information? If so, then this session is for you! Join us as we talk through the necessary information to build a solid long range plan and how to work through the ambiguous “gray” areas where data may not be available. Hear tips to help those just learning how to develop long-range capacity plans, and those that have been working with them for a while, to help navigate through conversations with limited information.

Incorporating Complementary Tools into your Workforce Management Infrastructure. Improve communication, collaboration, and process efficiencies between workforce management and Operations, incorporating complementary tools such as MS Teams, SharePoint, WebEx Teams and Asana. Panelists will demonstrate the capabilities of these tools based on their environment and share how it can improve communication, collaboration and the efficiencies gained between workforce management and supervisors, leads and agents. Walk away with actionable steps that you can take to enhance your Workforce Management support.

Adherence to Schedule: Lessons Learned Over Five Years. Come to this session to hear a case study from Gerber Life Insurance about the implementation of Adherence to Schedule in their organization. They will share lessons learned regarding processing exceptions, the impacts of a remote workforce, impacts to vendors, and how the best of intentions can cause things to go awry. After the first round of implementation, they were then able to apply those learnings to develop a replacement for adherence to schedule with a new goal that is better aligned with business needs. After a lot of mistakes and many changes, learn how the new method has been a much better fit.

10:00-10:15 a.m. – Break

10:15-11:30 a.m. – Workshops

Our WFM Journey: From Zero to Hero (well, almost) in 12 months. Come to this session to learn what a national WFM team did for a rapidly changing \$7B national healthcare provider to get ahead of the curve. Hear how the integration of new channels such as ChatBot and email were managed into the operating cadence and how roadmaps were leveraged to manage change. The staff also leveraged robotic process automation to streamline work efforts. Key takeaways include understanding the journey, including the WFM roadmap, learning about new KPIs and the transformation of the WFM team, reporting and forecasting excellence that got the team a seat at the table, and channel management strategies that made teams more effective.

60 Ideas in 60 Minutes – Tips & Techniques for Making the Most of Your WFM Software. This fast-paced session with a panel of vendor experts will provide you with a practice idea each minute. This is not a sales pitch for products. These are the vendor experts that can provide tips on how to get the most out of a WFM investment from the early planning stages, implementation, training, and ongoing use. This format will give you some last minute tips to take home and implement immediately!

The Journey of Selecting, Configuring & Managing Change for a New WFM System. Come to this session to help build a roadmap and learn best practices for implementing not only the software side of any Workforce Management system, but also how to manage the cultural change around the many business/human resource policies and guidelines WFM systems apply. This session will not be specific to any software, but best practices will be applicable to multiple environments. Attendees will be exposed to a project management framework and change management best practices and learn what not to do, from key pitfalls and real life experiences of WFM industry veterans.

WFM – My Job, My Life? Does it feel like you are constantly working? Are the mental gymnastics of your job wearing on you? Do you like what you do – but now you just need balance? In this session, we are going to honestly speak about the changing dynamic of being in this field, and the toll it can take on you. We will share common challenges, common understanding, and look at what might be coming in the future. We'll look at ways to help you take the load off, think about self-care, and find how you may be able to plug in to your community. It may be time to restore the balance and look to what is coming in the future WFM Workplace.

Getting it Right: The Power of Having the Right WFM Team Structure. Does something not feel “right” about your WFM team’s interactions with your customers? Are your customers or team members often frustrated? Perhaps it’s time to look under the hood at your team’s organizational structure. This workshop will dive into what several companies have learned about team organization and support. We will highlight our successful team structures, roles and responsibilities, and the way we promoted our team to build respect and positive working relationships.

LevelUP Your Capacity Planning Model. When new products are launched or system updates are driving your business, does your team have the bandwidth for new work – or even for work already in progress? The Cox Automotive WFM Team will share how the WFM team is predicting staffing needs and sharing insights across the business to proactively prepare for managing the workforce and client experiences.

Using Automation in Workforce Management to Gain Efficiency. Does your WFM team struggle to complete all of the daily repetitive activities that need to be completed to keep your business partners happy? Do you wish you had more time to be proactive instead of always reacting to staffing? In this session, we will walk through the decisions that directed us to begin automating many of these processes, including the pitfalls we have encountered, the real timeline of projects from beginning to end and some examples of our automation in action. Bring your ideas and we can tackle this topic as a team!

Working From Home: The Lessons Learned From Leading in a 99% Virtual Call Center. World Travel Holdings has been going remote for the past 10 years and now 99% of their agents work from home. All agents brought into the organization for the past five years have been interviewed, trained, and worked virtually without ever going to a brick and mortar call center. Come learn the pros and cons of working in a virtual call center, pitfalls to avoid when creating a work-from-home team, and unique challenges from leading employees you'll never see in person.

Agility in a Workforce Management World. Come to this session to learn about Agile project management methodology to drive continuous improvement and deliver incremental value. We'll introduce basic Agile principles like Scrum and Kanban, discuss why you need Scrum Masters and Product Owners, and explain the benefits of Backlogs, Standups, and Sprints. During this interactive Agile discussion, we'll talk about some of the challenges of using a software development methodology in a non-IT space and share some of our successes and failures as we matured along our Agile journey.

11:30 a.m.-12:00 p.m. – Closing General Session

12:00 p.m. – 2020 SWPP ends

Let's Party in Downtown Nashville

On Tuesday night, we're heading to Nashville Underground, one of downtown Nashville's exciting hot spots, for a fun evening of entertainment. Enjoy dinner and live entertainment in Nashville's historic downtown district!

Workforce Management Professional of the Year Award

SWPP will announce the 2020 Workforce Management Professional of the Year Award on Monday, March 30 at a special luncheon.

Sponsor Showcase

SWPP is pleased to provide a special Sponsor Showcase during the Conference to provide attendees with information about specific products of interest.

Networking Reception and Mixer

Join us for a networking reception to get the conference started. We have some special events and mixer activities planned to help you get acquainted with your fellow attendees.

Behind Closed Doors

Want some time to hear from your workforce management software vendor? The SWPP Sponsors will be holding group customer sessions to provide the latest information about upgrades, new releases, and new products. Meet other users in this group session led by your vendor.

Registration

You may register for the 2020 SWPP Annual Conference via phone, mail, fax, or on our website.

To register online, go to <http://www.swpp.org/annual-conference/> to complete the online registration form.

To register by phone, call 877-289-0004.

To register by mail, please print the registration form below and mail with payment to:

SWPP
ATTN: Annual Conference
6508 Grayson Court
Nashville, TN 37205

To register by fax, complete the registration form below and fax to 615-352-4204.

Name _____

Title _____

Company _____

Address _____

City _____ State _____ Zip _____

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Hotel Information

The 2020 SWPP Annual Conference will be held at the Omni Nashville Hotel. The Omni Nashville Hotel is specifically created to be an authentic expression of Nashville's vibrant music culture. Across from the new Music City Center, this luxury hotel is a one-of-a-kind experience, fully integrated with an expansion of the Country Music Hall of Fame and Museum® on three levels. Located at 250 5th Avenue South, the Omni Nashville Hotel design is a modern expression of the city's distinct character, incorporating natural materials, exposed steel and regional limestone. The multi-story hotel and expanded museum share meeting and entertainment space and bring additional restaurants and retail venues to this dynamic destination in downtown Nashville.

We have a block of rooms at the Omni Hotel at the conference rate of \$273 per night. You may book online at <https://www.omnihotels.com/hotels/nashville/meetings/2020-swpp-annual> or call the hotel directly at 800-843-6664 and tell them you are with the SWPP Annual Conference.

Transportation

The Omni is located 15 minutes from the Nashville International Airport. The hotel does not provide shuttle service, but there is a downtown shuttle available from the airport that is approximately \$20 per person. Taxis are available for a flat rate of \$25.00 to the downtown area, plus an additional passenger charge of \$1.00 when accompanying original passenger and proceeding to same destination. Valet parking is available at the hotel for \$34 overnight, and self-parking is available at the adjacent Music City Center for \$22 per day.

Costs for the 2020 SWPP Annual Conference:

Early Bird Registration: Registration through January 31, 2020

- \$1,495 for members
- \$1,745 for non-members
- \$1,790 for non-members with a one-year membership included
- \$100 discount per person for three or more attendees from the same company

Registration after February 1, 2020

- \$1,595 for members
- \$1,845 for non-members
- \$1,890 for non-members with a one-year membership included
- \$100 discount per person for three or more attendees from the same company

Pre-Conference Session

- \$395 for members
- \$495 for non-members

Total: _____

Please register by Friday, March 13, 2020

Payment Method

- Check enclosed (payable to SWPP)
- Charge:
 - American Express
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