Workforce Management Principles

Introduction

- Gathering WFM issues from participants to incorporate into course topics or handle at the end of the course.

Module 1: What is WFM?

- Defining WFM
- The Planning and Management Process
- Stages and Organizational Structure of WFM groups
- 6 step process for holiday planning
- WFM Maturity Grid

Module 2: Forecasting

- Four Key terms: Talk Time, After Call Work Time, Handle Time, Workload
- Forecasting Methodologies
- Common Forecasting Issues

Module 3: Resource Staffing

- Calculating Staffing Needs
- QueueView
- Six Immutable Laws
- Staffing Model
- Shrinkage
- Response Time Calculation

Module 4: Scheduling

- The Demand Curve
- Scheduling Process and Practices
- Scheduling Challenges and Options

Module 5: Effective Real-Time Management (RTM)

- Three Key Principles of RTM
- Communications
- RTM Monitoring
- Proactive Planning – Escalation Plan

Module 6: WFM Reporting & Analytics

- Data Administration: People, Time Management & Contacts/Calls
- WFM Metrics and Strategic Line of Sight
- Data Visualization

Module 7: Summary & Next Steps

- Six Key Learnings
- Action Plans/Next Steps