



WFM ESSENTIALS

Industry leaders agree that workforce management is an essential component in an efficient, productive team. But yet, WFM is not an understood function in the contact centre industry. This goes for retail as well.

So it's time to learn. Call Design's three-day Workforce Management Essentials course covers the critical WFM principles and applications that contact centre leaders need to know, understand, and most importantly, put into action. It has been designed to teach best practice theory, and has no dependency on owning or purchasing a particular brand of software for success - anyone can pick it up, regardless of existing business processes.

WHAT WILL I LEARN ON THIS COURSE?

As a part of Call Design's workforce optimisation program, the three-day WFM Essentials course will teach you how to forecast, schedule and manage staff in a contact centre or retail environment. It also covers contingency planning and communication skills.

WHO IS THIS COURSE FOR?

1. Workforce management managers
2. Workforce planners
3. Schedulers
4. Real-time analysts
5. Contact centre managers
6. L&D
7. Team leaders

MODULE 1: INTRODUCTION AND OVERVIEW

The course begins with an overview of the **what** and **why** of WFM. Workforce management is vital for getting the right staff in the right place at the right time, with the best possible tools in hand. But the myriad of factors included within the broader WFM spectrum can be a puzzle to work out alone, especially in fast-paced operational environments.

IN THIS MODULE

We dive into the various components of WFM, and cover some of the common workforce planning tasks and team structures. This module sets the scene for the entire three-day course.

We will cover:

1. Introduction to workforce management
2. WFM team structures

MODULE 2: FORECASTING AND PLANNING

Solid forecasting and planning underpins all best-in-class efforts to ensure staff can cope with demand, and a business does not creak at its seams. Forecasting has numerous practical applications. It'll help you compare historical patterns with "what-if" scenarios to estimate shrinkage, plan budgets and predict the number of contacts. Accurate forecasting will also help paint a complete picture of upcoming staffing requirements.

IN THIS MODULE

We explore the formulas and techniques used to analyse contact arrival patterns in order to calculate workload and plan for the future.

We will cover:

1. Time series analysis
2. Erlang C
3. Shrinkage
4. Attrition
5. Forecasting for other channels

MODULE 3: SCHEDULING

Forecasting is important, but without a schedule to implement these insights, businesses are still just hoping for the best. With thousands, if not millions of dollars on the line, getting your schedules right can make the difference between success and failure. Effective scheduling helps ensure the right people are in the right place at the right time and can help reduce stress for the staff themselves.

IN THIS MODULE

This module looks at the various scheduling components and flexibility options that are often provided to staff working in contact centres, branches or retail environments.

We will cover:

1. Scheduling considerations
2. Scheduling components
3. Schedule creation



WHY CHOOSE CALL DESIGN?

Call Design is a leading workforce management consultancy and has been helping to improve enterprise level workforce optimisation since 1999. Our team has significant experience implementing and training best practice Workforce Management and has access to Call Design's range of industry-leading WFM and WFO tools to help improve your business processes.

If you'd like to learn more about joining the Workforce Management Essentials course, or any other information about our service, get in touch today.



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MODULE 4: PERFORMANCE ANALYSIS

After you've created schedules, ideally you want to try to ensure staff adhere to them. Even in a small business environment with just a handful of staff a lack of performance oversight could mean you're missing service level targets when you don't need to. By monitoring performance however, you can help you find the staff who are out of adherence or underperforming, and address these issues with targeted change.

IN THIS MODULE

In this module, we explore the processes required to manage and monitor your staff's performance throughout the day.

We will cover:

1. Monitoring daily performance
2. Managing adherence and attendance
3. Measuring the WFM team's performance

MODULE 5: REAL TIME MANAGEMENT

You have the plan. Now it's time to monitor the day and take action if necessary. Real time management helps to preserve and improve your service quality and customer experience at the intra-day level. When things don't go to plan, which levers should you pull to achieve your required outcome?

A clearly defined real time management plan will help you determine the best actions to take when things don't turn out the way you expect.

IN THIS MODULE

We explore rules and conditions that can be used to manage the changes and impacts on demand and staff at an intra-day level.

We will cover:

1. Exception management
2. Contingency planning
3. Continuous Improvement cycle

MODULE 6: COMMUNICATION

Do you think you're an effective communicator? You may need to think again. According to a Wrike work management survey, 46 per cent of employees leave meetings not knowing what to do next. Additionally, CareerBuilder found that a quarter of workers find emails are a time waster, and a similar number felt the same about meetings. Basically, you may think you're communicating effectively, but your staff might not agree. So, Call Design's WFM Essentials course concludes with a module on better communication.

IN THIS MODULE

This module looks at how to effectively communicate with peers and manage conflict.

We will cover:

1. Effective communication
2. Creating a clear message
3. Choosing the correct medium
4. Dealing with conflict