

# CREATE A PLANNING CULTURE

Small changes that can make a  
big impact on your operation's  
efficiency and performance.

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**It's no secret that personnel costs make up roughly two-thirds of contact center operating budgets.** Getting the “right” number of staff in place is critical to ensure that your center can meet service goals and control costs. Yet one of the top missteps contact center leaders make is to deprioritize their strategic planning process in lieu of “running the contact center.”

The day-to-day execution of your staffing plan is a very important part of delivering service in a contact center. How well you're prepared for each interval of the day is a critical success factor that distinguishes good performance from chaos. By prioritizing contact center planning and investing in a workforce management (WFM) function, you can overcome staffing and workload challenges, control agent stress and become proficient at maintaining a cost-efficient environment.

### Plan to Plan

A fundamental first step is to dedicate the right resources to planning. Supporting a WFM function must be a top priority! WFM's planning role will coordinate much of what it takes to help leadership predict future events, which isn't a “straight-line” undertaking. Your WFM team will be asked to compile mounds of data and turn it into something usable for capacity planning and scheduling against daily and intraday volume patterns.

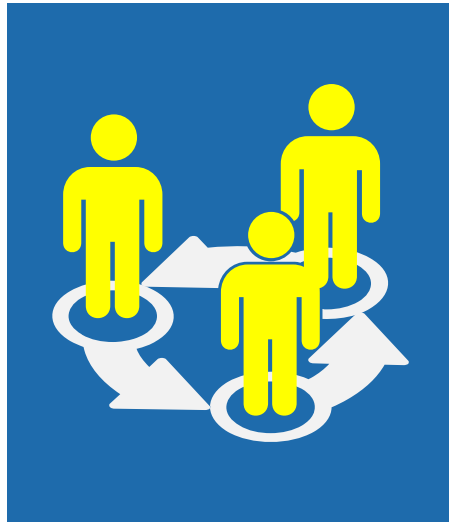
Expecting to “do more with less” by asking a contact center supervisor or manager to moonlight in the WFM role is a bad idea. WFM is a complex specialty function that provides return on investment by ensuring that your contact center has accurate forecasts, staffing models, efficient agent schedules, real-time analysis and reporting. Proficiency in these key functions promotes continuous improvement and creates the foundation of your planning culture.

The goal of contact center strategic planning is to provide a roadmap that will prepare you for cycles and growth in workload, staffing and strategic initiatives. In a planning culture, each interval that you're working today has been at least a year in the making.

An effective planning process will limit the chaos that exists in the contact center due to its dynamic nature. When you're able to understand and predict the dynamics with relative confidence, you will begin to gain control of your environment. With control, you will deliver consistency while building in the necessary time to support critical developmental needs that influence morale, like coaching, quality and training. Contact center planning becomes the vital exercise of ensuring that you have the right resources, short-term and long-term, to meet the needs of your customers and business, thereby controlling costs. You are continuously working to achieve the formula:

- When your workload forecast is right, then your staffing requirements are right;
- When your requirements are right, your schedules are right; and
- When your schedules are right, your service level will be right.

A planning culture begins to emerge as the functional areas collaborate on forecasts and schedules. Capacity models and budgets provide the basis to make decisions that extend beyond a typical three- to six-week scheduling horizon—and, in fact, can predict workload six, 12 and 18 months or more into the future. This is critical information needed to drive appropriate agent resourcing. It also provides growth guidance to executives, facilities management, IT, human resources and other key stakeholders in the enterprise's success.



You might be wondering, “What about WFM software? Won’t that do it for me?” Your software is a critical component, but it isn’t able to manage your workforce without a knowledgeable resource “at the wheel.” Whether you’re using Excel spreadsheets or a version of WFM software, WFM is highly process-oriented. Aside from software knowledge, WFM leaders must be proficient in creating and following processes for all the key functions of WFM, including forecasting, scheduling, real-time management and analysis. WFM software will enable good process to deliver good results.

### Plan to Execute

For effective contact center management, planning and execution must go hand in hand. (Remember your Ps: Proper Planning Prevents Poor

Performance.) To maintain continuity in the dynamic contact center environment, WFM and operations leaders must be constantly synchronized to the weekly performance influencing components, and the impact to long-term plans.

The forecasting, capacity planning and scheduling processes are all designed to build a plan to achieve the goals of the business. However, you can spend countless hours perfecting a forecast and perfectly aligning schedules to the requirements, but if you cannot count on agents to follow their schedules, it’s all a waste of time.

How well the WFM function and operations leaders are synchronized and have developed constructive relationships is one key to success. Other elements exhibited by well-oiled organizations are that they:

- Maintain open lines of communication.
- Are transparent.
- Have a shared view of the future.
- Have established trust.
- Maintain a consistency in their approach.


Those of you with an operations background have likely experienced the need to get creative with staffing, cancel scheduled activities and scramble to re-skill agents in an attempt to meet the daily service level goals. This reactive approach is akin to steering on a road between two ditches. As you may imagine, the technique requires hasty corrections to avoid a bad result. Abrupt changes in direction have a negative impact on your frontline management and agents. Meeting cancellations, mandatory overtime or other requests undermine trust in the planning process and the organization. The reactive cycle is rife with chaos and attrition—and it is hard to overcome until you start to hold your WFM team accountable for better long-term planning.

When it comes to executing the plan... the truth is, things usually don’t go exactly as planned. As a result, many organizations employ a real-time management (RTM) resource or team to help navigate deviations and understand the reasons for variances. The RTM team is a vital workforce management function, but it should NOT exist to help the operations team compensate for poor

planning. Real-time management will support and guide the operations leaders through the day's events, and equally important, provide valuable feedback into the planning cycle in an effort to continuously improve forecasting.

### Plan for Success

The results of your planning effort are in the numbers. As you work your plans each day, you're collecting valuable data that provide great insight for each functional role. You'll be able to answer critical questions about each process. It's easy to gauge how your contact center performs against the plan by tracking metrics like service level, quality and adherence. Likewise, the WFM function's planning efforts are evaluated through the use of additional metrics like forecast accuracy and schedule efficiency.

With common goals and teamwork, creating a planning culture is not difficult. It requires identification and commitment of the right resources, clearly defined roles, accountability to the appropriate metrics, process discipline and stakeholder collaboration. 

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