Performance Management Advisors 8.0

Workforce What-If Tool

User's Guide

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Workforce What-If Tool

The Workforce What-If Tool uses full-time equivalent (FTE) as the standard unit of measure for metrics calculations. Messages in the feedback area at the top of the calculator will help walk you through the use of the tool.

Note: Calculations are rounded to the nearest half-percentage, not the nearest percentage.

Forecasting Metric Values

To forecast metric values using the calculator:

1. Access the Workforce What-If Tool on your desktop by clicking the button.

2. For each metric, click ● to pin and type the input values.

   You must select at least three input values, two of which must be from the first three fields:

   - `Calls`—Call Volume per Call Volume Dimension (that is, minute, half hour, or hour)
   - `AHT`—Average Handle Time per AHT Dimension (that is, seconds, minutes, or hours)
   - `Agents`—Number of Agents
   - `ASA`—Average Speed of Answer per ASA Dimension (that is, seconds, or minutes)
   - `SL`—Service Level % within SL Wait Time per SL Wait Time Dimension (that is, seconds, or minutes)

   Note: If a dimension is modified when there is already a value specified, the value is automatically updated to reflect the new dimension.

3. Click `Calculate`.

The missing values are calculated. The `Calculate` button is available when enough input values are provided to make the calculation. If any of the required or pinned values are missing, illegal (for example, negative), or problematic (for example, infinity), a message displays.

Re-running a Calculation with New Input Values

To re-run a calculation:

1. Pin the metric (⬤) and set new values for the metrics.

2. Click `Calculate`.

Scenarios for the Workforce What-If Tool

The following are some scenarios that illustrate how you can use the Workforce What-If? Tool.

Scenario 1   You are expecting a typical volume of calls this morning and three people call in sick. What will that do to your service level, and what should you do about it?

How many agents are required for service level at 80%?

1. Click ⬤ and set the value of `CALLS` to 10 per minute.

2. Click ⬤ and set the value of `AHT` to 300 seconds.

3. Click ⬤ and set the value of `SL` to 80% in 20 seconds.

4. Click `Calculate`.

Fifty-seven agents are required for service level at 80% (see Figure 1 on).

Figure 1: Fifty-seven agents are required for service level of 80%

What is the effect of three fewer agents on your service level?

1. Click ⬤ and change the value of `AGENTS` from 57 to 54.

2. Unpin `SL`.

3. Click `Calculate`.

    With three fewer agents, SL% falls to 63.73%, which is unacceptable (see Figure 2). You cannot allow service level to fall below 70%.

Figure 2: With three fewer agents, SL% falls to 63.73%

How many agents would you need from other queues?

1. Unpin AGENTS.

2. Click ● and change the value of SL from 63.73 to 70.

3. Click Calculate.

   The number of agents changes to 55, which is acceptable (Figure 3).

Figure 3: The number of agents changes to 55.

Action

By moving just one person from another queue, you can expect a service level of 70%.

Scenario 2 What instructions can you give to your 55 agents to lower the average handle time, and therefore to raise the service level to 80% (where your incentive pay remains safe)? There may be places in the call flow where you can decide to forego certain steps to save time, such as inviting the caller to visit your new web page. Generally you do this when properly staffed, but you may need to be more responsive.

What should the AHT be for 55 agents and a service level at 80%?

1. Unpin AHT.

2. Click ● and set the value of AGENTS to 55 .

3. Click ● and change the value of SL from 70 to 80.

4. Click Calculate. AHT must be around 294 (Figure 4 on).

Figure 4: AHT must be around 294

Action

Instruct the 55 agents to skip the invitation to the web site, just for this morning.

Scenario 3   Now it's the afternoon. Call volumes are falling off and expected to stay that way. How many people can you send home? As you let people go home, you don't want ASA to go past 30 seconds.

How many agents are required when AHT is 300 seconds and ASA is 30 seconds?

1. Click ⬤ and set the value of CALLS lower, from 10 calls per minute to 500 calls per hour.

2. Click ⬤ and change the value of AHT back to 300 seconds.

3. Unpin AGENTS.

4. Click ⬤ and set the value of ASA to 30 seconds.

5. Unpin SL.

6. Click Calculate.

   The number of agents drops to 46, but service level is below 70%, which is unacceptable (Figure 5 on page 8).

Figure 5: The number of agents drops to 46 but service level is below 70%.

What if you keep 47 agents instead of 46?

1. Leave AGENTS pinned (🔴) and change the value of AGENTS from 46 to 47.

2. Click Calculate. Service level rises to 77.5%, which is acceptable (Figure 6).

Figure 6: Service level rises to 77.5%.

Action

Move the borrowed agent back to their original queue. Roll one agent off the phones each half hour, only if service level remains at 80% or higher, expecting to allow up to seven agents to go home (55 agents minus the borrowed agent, minus 7 more, results in the 47 agents that you calculated).

Note: The Workforce What-If? Tool does not account for shrinkage (this is the percentage of an FTE that accounts for time that is not productive). When you consider agent decisions using the Workforce What-If? Tool, be sure to account for shrinkage using the value that is used by your company. For example, if shrinkage is 20% and the Workforce What-If? Tool calculates that you need four agents, you really need five agents. This is because 20% of the five agents is shrinkage, leaving the four agents you really need.