

CONTACT CENTER SCHEDULE ADHERENCE

7 “Not-So-Best” Practices and
How to Make Them Better

CONTACTS

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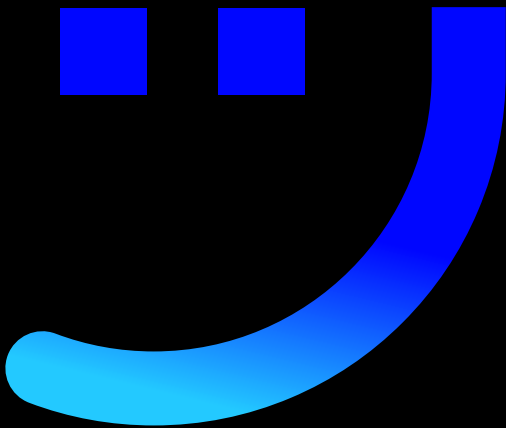
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Introduction

Many workforce management professionals spend their days putting out fires because people are not where they are supposed to be. When the day is done, they face stacks of after-the-fact exceptions that must be entered into the system in order for adherence scores to “look” good. But a good adherence score cannot hide missed service levels and customer dissatisfaction.

Workforce management systems alone are not the answer. Although designed to help contact centers improve productivity, operational efficiency and customer satisfaction, a workforce management system is only as effective as the contact center’s workforce management processes.

The Real Purpose of Schedule Adherence

Schedule adherence measures how closely agents follow, or “adhere to,” their scheduled activities. When an agent’s scheduled activities match their actual activities as reported by the ACD, an agent is considered to be 100% in adherence. Any deviation from the agent’s scheduled activities, which includes entered exceptions, results in a lower adherence score.

On the surface, it appears the reason for measuring adherence is ensure agents understand the importance of following their schedule. The reality is there are many reasons that organizations monitor adherence.

In the contact center industry, especially for inbound call environments, measuring schedule adherence will:



Ensure accurate visibility into projected coverage necessary for intraday decision-making



Promote operational efficiency, increased productivity, reduced occupancy, lower average wait times and greater customer satisfaction



Enable the business to more effectively plan future staffing needs based upon insight into the historical use of agent resources

The scrutiny of adherence sometimes prompts people to update schedules after the-fact but this only undermines the effort.

Making Adherence “Look” Good

In too many contact centers, the real purpose of schedule adherence has been lost. The methods used for measuring adherence and managing schedule exceptions only serve to make adherence “look” good.

ⓘ *Results from quarterly surveys conducted by the Society of Workforce Planning Professionals (SWPP) indicate that further support this claim:*

- Surveys on schedule adherence, 14% responded “other” when asked about their adherence goal, with the most frequent comment indicating there was no goal.
- Surveys on managing schedule exceptions, 20 percent responded “zero” when asked how many FTE were responsible for entering exceptions.
- The 2018 survey found that nearly half of respondents used a vendor-provided WFM system to measure adherence to the planned schedules, while another 9 percent use a home-grown WFM system. A few use spreadsheets, but 35 percent said they did not monitor for adherence.

These results reflect a larger issue: Too many contact center managers don’t understand the real value of schedule adherence. Furthermore, they hold the agent population accountable for adherence results but don’t hold themselves accountable for working with the WFM team to maintain schedule accuracy. There is plenty we can learn from the trappings of such mistakes.

Seven Not-So-Best Practices

As with other aspects of contact center management, when it comes to measuring adherence and managing schedule exceptions, there are best practices and there are “not-so-best practices.” The following seven not-so-best practices are common across many of today’s contact center environments.

1. Having No Adherence Goal

ⓘ *It’s never too late to start measuring adherence. When starting out, it’s important that the goal you set not be too aggressive. Set your target based upon the average adherence scores of your agents today and then periodically raise the goal as performance begins to improve.*

2. Having the Wrong Adherence Goal

In environments where handling times are relatively short, it is easier for agents to adhere to their scheduled activities without running the risk of getting stuck on long calls. Conversely, in environments where long calls are the norm, meeting, break and lunch times can be extremely difficult. Trying to use a one-size-fits-all adherence goal results in a goal that is too low for some and too high for others.

ⓘ *If handling times differ significantly between groups (more than a couple of minutes), then you probably want to consider setting different adherence goals for each.*

How To Determine An Appropriate Adherence Goal

STEP 01

Calculate the average number of total minutes agents are scheduled to handle customer calls each day. **7.5 hours x 60 = 450 minutes.**

STEP 02

Identify the number of break stopping points, including when agents log off for the day.
Example: Agents who receive 2 breaks and a lunch would have a total of 4 break stopping points.

STEP 03

Multiply the average handling time minutes by the number of break stopping points. **5 minutes AHT x 4 = 20 minutes adherence buffer.**

STEP 04

Divide the adherence buffer minutes by the total schedule minutes, convert to a percentage and subtract from 100. **20 / 450 = .04, or 4% adherence buffer 100% - 4% = 96% adherence goal.**

ⓘ **Note:** *Schedule adherence is best used for agent groups where the AHT is less than the break time. In cases where the calculated adherence buffer exceeds 10% of an agent’s scheduled hours, conformance, which measures an agent’s adherence to TOTAL time scheduled, may be a more appropriate metric.*

3. Entering Exceptions for Long Calls

To compensate for a lack of adherence goals, many operations simply end up adjusting breaks and lunches. Although entering exceptions for long calls does serve to improve agent adherence scores, the practice creates unnecessary administration and may result in issues with morale when agents observe long call adjustments being applied inconsistently.

ⓘ *Appropriate adherence goals already take occasional long calls into consideration. Therefore, the practice of adjusting breaks, lunches, or other activities because of long calls is unnecessary and only serves to mask an agent’s true adherence.*

4. Entering Exceptions After the Fact

Entering exceptions after-the-fact just to improve adherence scores undermines the purpose of measuring adherence in the first place. This practice eliminates management’s visibility into scheduled resources making it difficult to make any proactive staffing decisions based upon projected coverage. As a result, the contact center loses its ability to answer customer contacts efficiently.

ⓘ *Educate operational staff on the benefits of entering schedule exceptions in advance. In addition to this, work with the management team to establish policies that hold supervisors accountable for not reporting exceptions on time. Institute a policy that allows adjusted adherence scores for agents but holds supervisors accountable for initial adherence scores.*

5. Pulling Agents Off-line Without Approval

One reason after-the-fact exceptions are so pervasive is because supervisors are often allowed to pull agents off-line without first getting approval from the WFM team. Supervisors don’t typically have insight into projected coverage and other activities that are taking place on the call floor. Pulling agents from what they are scheduled to do can seriously impact the contact center’s ability to meet service level objectives.

ⓘ *Supervisors and other members of the operational team should coordinate all activities affecting agent schedules through the WFM team. By doing so, the WFM team can make them aware of potential impacts to customer service and, if necessary, recommend alternative days and times when there is sufficient overstaffing to compensate.*

6. Measuring Average Adherence on a Weekly or Monthly Basis

Measuring average adherence on a weekly or a monthly basis masks results and provides no insight into how well schedules were followed or managed when it really mattered.

ⓘ *Schedule adherence should be measured and reported on a daily basis. By doing so, the contact center is in a better position to identify and quickly remedy any schedule management or adherence issues that are impacting customer service results. When adherence is measured and reported on a daily basis, not only does management have a more realistic picture into the previous day’s performance, supervisors also have a more meaningful tool with which to engage their agents.*

7. Only Holding Agents Accountable for Adherence

Contact center managers often place most of the blame for poor adherence on the agents. In reality, it is the operational team’s policies and processes regarding schedule management that is largely responsible for issues related to adherence.

ⓘ *Everyone must be held accountable for adherence goals. This means measuring adherence at the (a) supervisor level to reinforce the importance of reporting schedule exceptions in advance and (b) department level to reinforce the importance of maintaining intraday visibility into projected staffing levels. Only when everyone is accountable will schedule adherence play a meaningful role in your contact center’s performance.*

Achieving Adherence Results with Workforce Management

Managing schedule exceptions and adherence results without the aid of a workforce management system is near impossible. Some of the features workforce management systems provide that aid contact centers in managing schedules and adherence include:

- **Real-Time Adherence (RTA):** RTA provides managers with immediate visibility into scheduled versus actual agent activities, alerting them to potential issues so they can take immediate action.
- **Historical Adherence Reports:** By comparing agent schedules with actual login/logout activity provided by the ACD, historical adherence reports provide supervisors with a valuable tool for training agents.
- **Intraday Management:** Intraday management screens provide visibility into projected service level results and coverage based upon actual volumes and scheduled resources. Using this insight, managers can be more proactive when making staffing decisions throughout the day.
- **Drag-and-Drop Schedule Modification:** By making it easy to modify schedules, workforce managers are better equipped to match staffing to demand.
- **Agent Empowerment Tools:** Workforce management systems that enable agents to automatically trade schedules with other agents and request scheduling exceptions (like tardiness and customer call-backs), streamline administrative tasks associated with managing schedules.

Conclusion

When used in conjunction with effective schedule management processes and practices for measuring adherence, workforce management systems increase agent productivity, improve operational efficiency and drive greater customer satisfaction.

To meet service level goals most efficiently, workforce managers and operational leaders must be willing to review and revise their current processes for measuring adherence. When exceptions are entered in advance and everyone is held accountable for adherence results, schedule adherence will be a metric that drives better performance.