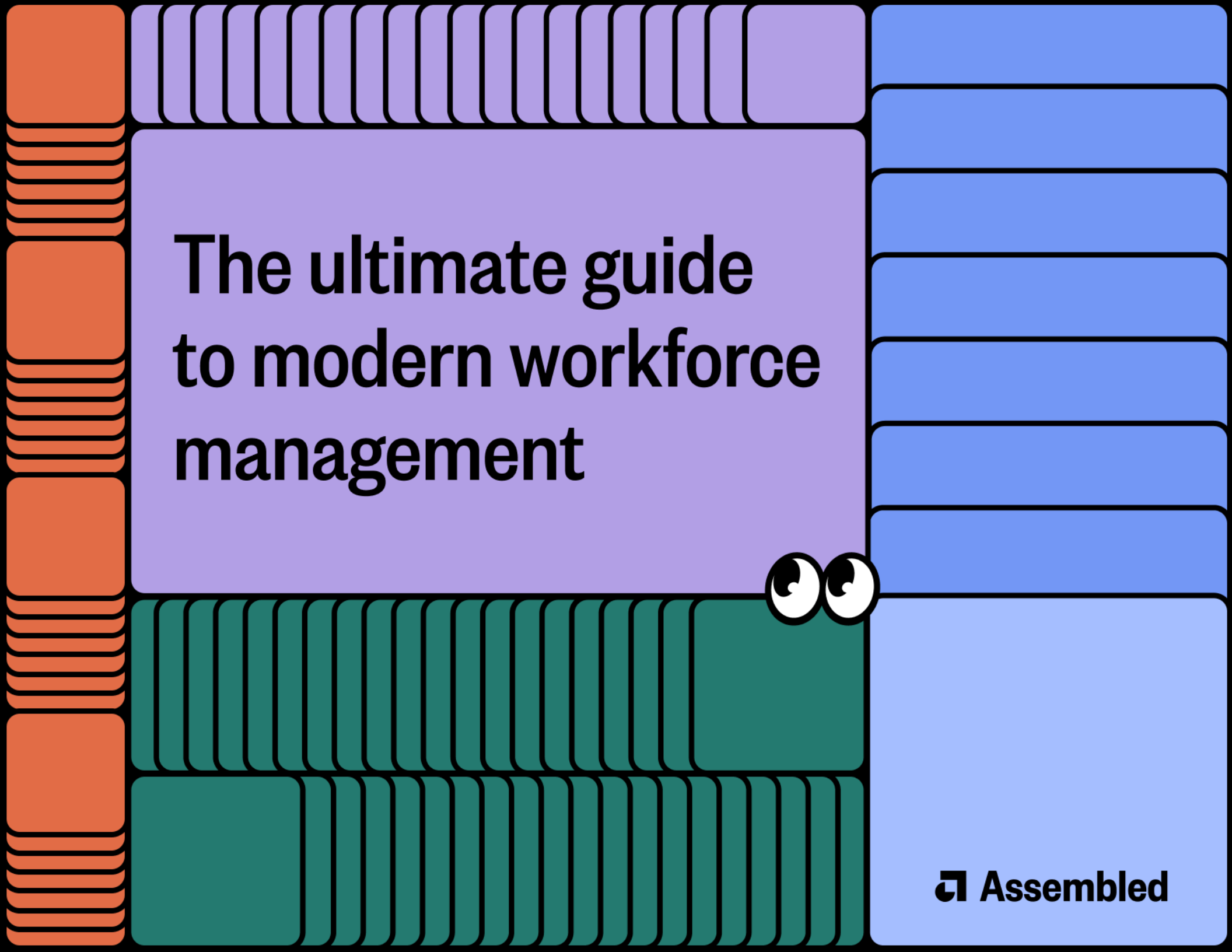




The ultimate guide to modern workforce management

What is workforce management?

Your team of support agents has been hit with a major influx of tickets that you didn't see coming. Everybody is stretched to the limit and your customers are stuck dealing with long wait times, unhelpful interactions, and dreaded hold music. Morale is declining. Requests are piling up.

You and your customers need a better solution, but where do you start? Maybe you reluctantly call in reinforcements to help carry the load, knowing that you'll need to explain the budget increase to finance down the road.

Assuming that you'll need that increased bandwidth for the foreseeable future, you schedule more customer support agents for the next few weeks. But then, things slow down again and you have a huge team of people dealing with nothing but crickets. Your customers are quickly losing trust in your brand, your team is either overworked or bored (with no in between), and you're left in the dark about how many agents you need and when you need them.

Sound familiar? It's a common problem, and it's also a fitting and relatable example of why workforce management is so important.

OK, so what it is really?

Workforce management (often abbreviated as WFM) is a fancy term for a relatively straightforward concept: putting systems and processes in place to ensure that you have the right people in the right place at the right time.

Looking at customer support scheduling in particular, workforce management is focused on making sure that you have the right supply of customer support agents in place to match your customer support

demand. Ideally, you have just enough people to effectively address tickets in a reasonable response time, but not so many that people are left twiddling their thumbs.

Workforce management isn't just about getting the right people in place to handle today's responsibilities—it also involves forecasting so that teams are prepared to respond to future demands without a frantic scramble.

As defined by the International Customer Management Institute:

Contact center management (also known as workforce management) is the art of having the right number of properly skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality.

We like to think of workforce management as split into five different time periods:



Short-term

Focused on your workforce management needs a couple of weeks out. Do you predict increasing demand as a result of public relations efforts, promotions, or launches? How does your current headcount match up to that prediction?



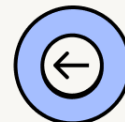
Mid-term

Focused on your workforce management needs eight to ten weeks out. To plan most effectively, you'll review your real-time and short-term data to create mid-term schedules that are grounded in reality.



Long-term

Focused on your workforce management needs a few months to even a year or two out. What are the predictions for your organization's growth? How many more customer service agents do you think you'll need to support that expansion?



Historical

Focused on reviewing what happened this past week, month or quarter.



Real-time

Focused on your workforce management needs on that specific day. Do you have unexpected downtime and need to move customer service agents to other projects? Are you overwhelmed with tickets and need to get some more hands on deck? Real-time workforce management is about looking at live data to see if your resources match your current needs, and making any necessary changes to course-correct.

Is it time for workforce management?

To get started, let's cover a few questions you can ask yourself and your customer support team to get a grasp on your workforce management needs for today, tomorrow, and well into the future.

	Short-term	Mid-term	Long-term	Historical	Real-time
Where can we improve/optimize?				●	
How many phone calls or emails will we receive this time next week?	●			●	
How many people must be staffed in order for us to respond within a desired amount of time?	●	●	●	●	●
At the moment, are people actually working on what we expect them to be working on?			●	●	
Who can take time off at what times in order to balance fairness and schedule flexibility with the needs of the business?	●	●		●	
How should staffing be adjusted to make the operation more efficient?	●	●		●	●

It's obvious that acing workforce management brings along a number of swoon-worthy advantages. But, change is intimidating—thinking about overhauling the way you currently do something (even if it involves jumbled spreadsheets that make your eyes cross) feels overwhelming.

With that in mind, we don't blame you if these questions are rattling through your brain:

- Is now the time to think about workforce management?
- Is this something I should prioritize immediately?
- Or can I push this off until we're really struggling?

It's never too early or too late to streamline your workforce management strategies. Sure, things are simpler when you only have a small team tackling tickets. But even then, effective workforce management always leads to positives.

Looking for some more concrete indicators that it's time for you to shine a spotlight on workforce management? Here are a few signs to keep an eye out for.

SIGN 1

Your business is getting a lot more complex



As your business grows, you get more customers. As you get more customers, there are more customer support demands and interactions happening. As those interactions increase, you need more support agents—and that's when customer support scheduling really starts to get messy and headache-inducing.

You'll know you're experiencing this if...

- You're noticing business growth in revenue and customers, but not on your support team
- You're hiring team leads and overall growing your customer support team
- You're expanding the team to different offices, and/ or expanding your hours of coverage
- You're incorporating more support channels, especially live ones
- You're introducing specialization (such as a support team for billing vs. product troubleshooting)

SIGN 2

Your aiming for ambitious targets



Your support team is no longer just trying to keep their heads above water. Instead, they're chasing lofty targets (such as improving response times, as just one example) and you're keeping a close eye on the metrics to ensure that you're providing the best service you possibly can. Making that happen requires the right people and resources.

You'll know you're experiencing this if...

- You're starting to set targets for your support team for the first time
- You're realizing that hitting your targets requires more hands on deck
- You're implementing processes to organize the team around those metrics

SIGN 3

Your current systems are falling short



What worked well for you a couple of months ago might not work as seamlessly now or in the future. As the business and the team grows, you're bound to see some cracks forming in your existing systems and processes that indicate it's time for an overhaul.

You'll know you're experiencing this if...

- You're running into snags with your existing spreadsheet or scheduling tool
- You're investing hours in tasks that should be painless and straightforward
- You're frequently encountering scheduling and staffing problems
- You're noticing that team motivation and morale is waning
- You're hearing frequently complaints about schedules and workload

Why is workforce management important?

Scheduling and forecasting can feel like a complex puzzle, especially if you don't have a crystal ball handy. And, while there's no guaranteeing that you'll be able to predict the future with 100% accuracy, taking the time to understand workforce management and iron out the best workforce management solutions offers a number of benefits, including:

Delivering top-notch customer support

Now more than ever, your customer support interactions have a chance to go viral. Understandably, you want that experience to be positive and not a total PR nightmare.

When your customer demand and your customer support resources are aligned, you're able to provide a stellar experience for your customers—rather than sticking them with frustratingly long hold times or bouncing them between departments that never address their problems.

Fostering a positive and flexible culture

Customer support is a business function where employees feel like they need to be “always on.” Customer problems and questions don't take holidays, weekends, or evenings off, and it's tempting to feel like your support team needs to be staffed 24/7/365.

But, when workers care more about flexibility than ever before (94% of employees say they'd benefit from flexible work options), it's important that you balance customer needs with your workers' desires for adaptability and autonomy. Workforce management can help you walk that fine line and give customers what they expect without sacrificing the happiness and morale of your team.



Avoiding customer support agent burnout

Related to the above, burnout runs rampant among support teams. Many customer interactions have the potential to be highly charged and emotional, which takes a toll on your agents.

Burnout is only exacerbated if all of your support agents feel spread thin and overwhelmed. Workforce management helps ensure that you're maximizing your resources without piling too much on any one person. That gives them the time that they need to rest, recharge, and return to work feeling motivated.

Does workforce management pay off?

The benefits of workforce management look great on paper. But, does it actually work that way in reality? Can workforce management really make that much of a difference in terms of your efficiency, customer service, and team morale? Here's the short answer: yes.

As the old saying goes, the proof is in the pudding. So, here are a few real-world examples of companies who reaped the benefits of an effective workforce management system:

FLOYD

Furniture company Floyd used a tangled web of spreadsheets, documents, and email threads to manage a 10-person support team that responded to inbound emails, chats, and questions from the in-store team. After deciding to prioritize workforce management and switching to Assembled for their workforce management software, they spend 67% less time per week on scheduling.

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DAILY HARVEST

For direct-to-consumer food company Daily Harvest, scheduling the members of the Care team was a nightmare—especially since a portion of the team works remotely. As volume increased, Daily Harvest tried over-staffing to make sure their bases were covered. But, over time, they realized it wasn't a smart or sustainable solution. Daily Harvest turned to Assembled to streamline their workforce management and scheduling and immediately saw the payoff. "I could spend a full day's work—eight hours—to put together a schedule for the following week," said Shelton Wirth, the Care team manager. "Now it takes 20 minutes to do a whole month."

stripe

With over 1,000 agents spread over 13 offices in various time zones, payments platform Stripe was doing a ton of tedious and manual work to ensure appropriate staffing of the support team. Plus, without real-time visibility into what was happening, Stripe was struggling to meet their target response times. Using Assembled empowers them to experience the major upside of effective workforce management, including saving over 20% in team hiring and improving schedule adherence by 33%.

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The top myths about workforce management

Better support, improved productivity, less stress, a happier team—there are tons of perks associated with workforce management. However, it can still be pretty misunderstood.

That's why we're dedicating this section to separating fact from fiction. Here are a few of the misconceptions we've heard about workforce management, as well as why they couldn't possibly be further from the truth.

#1: Workforce management is always top-down

Truth: Workforce management isn't about doling out schedules and directions to support team members. On the contrary, everybody benefits from the increased visibility and flexibility. Decision-makers have the information and transparency they need to make smart choices and prioritize the human needs of their support team—and not just the numbers.

#2: I have to be a WFM expert

Truth: The right workforce management solution will make your life easier, not more difficult. A platform like Assembled is intuitive to use without a huge learning curve. Plus, support team leads can still trust their instincts for scheduling, but use Assembled as a gut check and confirmation that they're on the right track.

#3: Everything needs to be perfect before WFM

Truth: Workforce management isn't something that you do once you

have all of your ducks in a row—it's what helps you get your ducks in a row. For example, you don't need to achieve peak productivity before you introduce workforce management. Instead, it'll give you the data you need to improve productivity levels.

#4: WFM is only for companies of a certain size

Truth: Your approach to workforce management is a core element of your team's culture. It's far better for you to set the right operating norms earlier, rather than introducing one after existing processes run off the rails.

#5: All integrations are built the same

Truth: Workforce management will change the way you handle forecasting and scheduling, but it doesn't need to be a complete departure from the way you currently operate, especially if you use software that integrates with the tools your customer support team is already using. Clunky or non-existent integrations will only slow you down.

#6: WFM is a culture-killer

Truth: Despite the fact that workforce management sounds formal and technical, it's not something that should stifle your company's culture. In fact, it does the exact opposite. It exists to help you make the best use of your human talents in a way that also meets the business' needs. Adequate and thoughtful scheduling makes your agents feel more in control and empowered.

Sign me up, how do I get started?

Staffing and scheduling your customer support team can feel like a teetering Jenga tower—one wrong move in either direction and the whole thing comes toppling down.

While there's always a slight element of uncertainty looming in the background (cough, 2020 anyone?), workforce management can help you understand your data, make informed staffing decisions, and create a schedule that offers nothing but positives for your support team, your customers, and your entire business.

How do you make the leap from knowing you need a better scheduling and forecasting solution to actually doing it? We have some encouraging news for you: You're probably already handling workforce management to some degree.

Maybe you have a rough system or checklist mapped out in your head that you mentally work through each time you create a schedule. Perhaps you're using a combination of online tools and spreadsheets. Or maybe you're still scribbling by hand on a piece of paper.

While none of those are perfect approaches on their own, you don't need to start from scratch with workforce management—rather, you need to consolidate and formalize your system by bringing everything into workforce management software.

The right software makes it way easier to get real-time data, make predictions, and line up your customer demand with staffing (without all sorts of manual elbow grease and guesswork). Best of all, the right software can make workforce management more straightforward.



Request a demo with Assembled

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Assembled

Assembled is a workforce management platform that gives modern support teams more accuracy in staffing, more ease and control in schedule creation, and better visibility into the data that helps them improve performance and advocate for themselves. Today, our solution helps customer-centric brands craft world-class customer experiences.

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