



Workforce Management

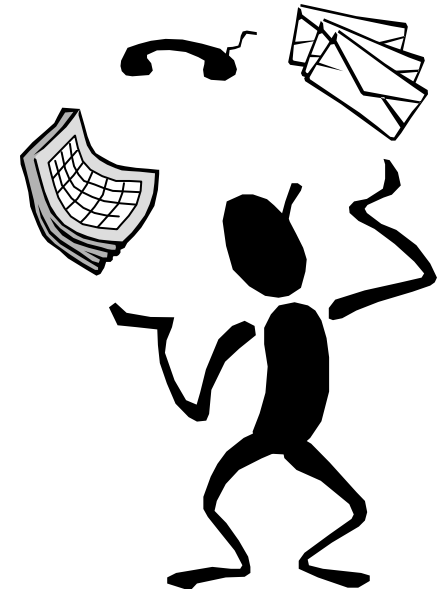
Debra Bentson

Enterprise Workforce Manager

Delta Dental

Workforce Management

- Why Workforce Management?
- Decision Maker or Consultant?
- The journey of Workforce Management at Delta Dental
 - Paradigm shift
 - Meetings
 - Our Workforce Team
 - Lesson learned - Use what you paid for
- Questions?



Why Workforce Management? ...Money and Happiness



- "Workforce Management is a critical factor for the success of a call center, 75% of total costs being allocated for labor." (Call Center Expertise 2008)
- Benefits of implementing a Workforce Management strategy
 - Improve agent morale and reduce absenteeism by smoothing call patterns
 - Provide scheduling efficiency
 - Reduce unproductive shrinkage
 - Reduce network costs by minimizing hold times
 - Improve service level results and caller satisfaction
- Prepare to invest in Workforce:
 - Hire people with the requisite skills to be successful - a blend of internal who know the business and external to bring new ideas from other businesses
 - Budget to provide the initial and on-going training to create and grow skills
 - Train agents and management so they support and understand the process
 - Create a culture that supports sound Workforce Management practices

Decision maker or consultant?

- The Workforce team will
 - Prepare forecasts and staffing plans
 - Recommend actions to be taken
- Stakeholders, workforce and the business meet to discuss the documents and recommendations
- There must be agreement on who owns responsibility for the following items - whoever owns one, owns them all
 - Final decision maker in cases where there is no agreement
 - Fiduciary (budget) responsibility
 - Results - service levels, etc.



The journey of Workforce Management at Delta Dental



Paradigm shift to unify the 4 sites: Think Globally – Act Locally

	Previous State	Current State
Accountability	<ul style="list-style-type: none"> • Critical functions were handled within each site without the benefit of cross training or support from other sites • Business units received inconsistent level of support based on WFM site presence - no support if the local WFM coordinator was off work 	<ul style="list-style-type: none"> • All critical functions are scheduled and assigned to team members along with secondary and tertiary backups • Business units receive a consistent level of support
Process Documentation to align sites	<ul style="list-style-type: none"> • Folklore - anecdotal processes that were inconsistent from site to site. • Best practices were not shared between sites. 	<ul style="list-style-type: none"> • Process documentation and best practice teams are composed of team members from every site to develop working relationships, synergy, and reinforce the One Team concept • Processes are documented to identify best practices and differences by site due to contractual obligations are documented to create alignment within Workforce Management
Developing Relationships	<ul style="list-style-type: none"> • Coordinators had relationships with the business unit management within their own site • Some member of the Workforce team had not even had conversations with each other 	<ul style="list-style-type: none"> • Coordinators in each site own the primary relationship with the supervisors in the site • Analysts, based on the business units they support, own the primary relationship with the managers in the site • The Workforce team has strong communications and supportive working relationships with each other
Summary	<ul style="list-style-type: none"> • Functions were maintained within the silo environment of the site in which the Workforce Coordinators sat 	<ul style="list-style-type: none"> • Every team member has system access to all of the Workforce Management mailboxes, Symposium monitoring, and real time monitoring for all sites • Any Workforce Coordinator can support any site any time from anywhere

Workforce Management Meetings



- **Goals of all of our meetings:**
 - Regularly scheduled communication to share information
 - Opportunities for collaboration across departmental lines
 - Inclusion and agreement in the plans and process
 - Reinforce how inter-dependant each role is to achieving success for the overall Enterprise
- **The Daily Performance meeting:**
 - Audience: Workforce Management Team, Managers, Directors
 - Topics: Previous day's results, current day's attendance/scheduled activity, updates, system issues.
- **The Weekly Resource Meeting:**
 - Audience: Subset of the Workforce team, Managers, Directors
 - Review and discuss:
 - The updated staffing plans for each business area
 - Review the training plans for upcoming activity, make agreements on new training requirements
 - Review the inter-day performance reports for the following week to determine if any additional time needs to be offered to the agents
- **The Workforce Team Meeting:**
 - Audience: The Workforce team
 - Review agenda and action items
 - Start the month with a broken thing, end the month with a good thing
 - Share news, best practices, discoveries

Our Workforce Team



- The Coordinator
 - Administer shift bids
 - Monitor the Enterprise real-time for agent and call activity - taking action when either is not working as expected
 - Schedule training, development, coaching, and all other off-call activity
 - Code the timecards for all of the agents
- The Analyst
 - Update the assumptions used to create the staffing forecasts and capacity plan
 - Provide customer reporting and analysis to help management understand "why"?
 - Create the shift bids
- The Manager
 - Provide direction and structure for the team
 - Remove obstacles from the path of the team
 - Educate the business
 - Develop and evaluate the team's performance
 - Encourage fun and laughter



Lesson learned – use what you paid for...

- Delta Dental selected and purchased the Aspect eWFM application as it's workforce tool. The following components were not implemented until three years after the purchase.
- eSchedule Planner allows the agents and supervisors to view schedules in real time.
 - Drives awareness and accountability for both the agent and supervisor to adhere to schedules
 - Saves time by eliminating manually creating an e-mail and attaching the agents schedules
- Notification Server automatically sends a notification e-mail to the agent and supervisor when schedule changes are made.
 - Provides an audit trail with a time/date stamp
 - Saves time by eliminating manually creating an e-mail to notify agents of a change in their schedule

Questions?

