

Workforce Optimization Marketing Kit

Optimizing the Human Environment of Next Generation Contact Centers

Overview

Workforce Optimization capabilities provide the workforce planning, performance management and quality measurement capabilities that contact centers rely on to plan for, manage, and track the customer contact work that is done within the contact center as well as outside the contact center. Workforce optimization capabilities are especially effective when part of a comprehensive customer contact platform. Many of the metrics that drive better workforce optimization are captured by customer contact communication technologies, making an integrated solution essential to mastering next generation customer contact challenges.

Organization Profile

Buyer Personas

Organization Profile

Industries: Financial Services (Banks/Insurance Providers), Retail, Healthcare, Utilities, Professional Services, Telecommunications

Revenue: \$500M+

of Agents: 100+

Business Functions: Customer Service, Collections, Telesales

Persona Conversation Starters Pain Points

Executive Sponsor

Playbook Titles: VP/Director of Customer Service, VP Collections

Top Concerns

- Not able to prove to executives value of their call center investment
- Maintaining their budget
- Too much time spent waiting on reports and metrics from their staff
- Too many reports and inconsistent metrics they need to reconcile

Conversation Starters

We've heard from many of your peer that they are facing increasing pressure from the top to deliver better customer service at lower costs. Some of the challenges your peers note are:

- How to lower labor costs without having to compromise on service levels
- How to save on the operational overhead when having to bring on additional contact center sites
- How to introduce additional contact channels without incurring huge costs – and to do so quickly
- Delivering the kind of service experience that has a positive impact on customer loyalty and customer value

- The impact of back office fulfillment on customer satisfaction – when the back office can't deliver, it is reflected in lower satisfaction scores

Functional/Operational Sponsor

Playbook Titles: VP Operations

Top Concerns

- Too much time and money spent on on-boarding and recruitment due to constant agent turn-over
- Too much time and effort spend gathering data and putting together reports that show agent performance and agent quality across their operations – in-house & remote agents, multiple sites, etc.
- Inconsistent enterprise support for agents from back office and others dragging down customer satisfaction scores
- Rising demands for service (requests from customers more complex) without getting budget for additional hires

Conversation Starters

We've heard from many of your peer that they are struggling to manage their customer contact centers in the face of higher – and more complex – demands for service from the enterprise and from customers along with static budgets and increased operational complexity. Some of the challenges your peers note are:

- How to create a better working environment for agents -- without raising salaries -- to drive down attrition
- Managing service inconsistencies between agents – especially when there are in-house and remote agents across multiple sites and where agents come with very different skill sets
- How to get to performance and quality metrics for the total operation faster – and spot issues before they have a negative impact
- How to get better results from coaching and training – how to find the time, how to determine the right topic, and how to track results
- The impact of back office fulfillment on customer satisfaction – when the back office can't deliver and enterprise resources aren't there for support, it is reflected in lower satisfaction scores and the contact center gets the blame
- Having to shift resources around very quickly to accommodate changes in demand for specific skills and push on various channels
- Introduction of new channels – such as social media – and needing to find ways of accommodating the skills and the additional work from those channels

IT

Playbook Titles: CIO, IT Director, IT VP

Top Concerns

- Minimize system disruption
- Minimize hardware costs
- Leverage industry standards
- Ensure software meeting business goals
- Level of support from vendor
- Minimize risk through PCTI compliance

Conversation Starters

NOTE: IT is typically not the primary buyer but is an important influencer. IT needs to be engaged in the cycle once there is buy-in from the executive/operational stakeholders. The IT message is to focus on the top IT concerns listed above.

We've heard from many of your peers that they are struggling to meet the needs of the business within the budgetary IT constraints that are in place. Some of the challenges your peers note are:

- Needing to create custom and maintain integrations to proprietary systems because their contact center technology is not integrated with their enterprise IT architecture
- Needing to rely on multiple technologies and multiple vendors for WFO capabilities requested by the business (planning, performance management, quality) – needing to maintain multiple relationships and multiple maintenance and support agreements
- Needing to integrate disparate sources of information and provide custom reporting views to business
- Inability to achieve a total contact center virtual environment or consolidation into data centers

Workforce Optimization Pain Points

Contact Center Operations

- Aren't meeting established service levels consistently across customer segments, channels and/or teams.
- High agent attrition/turnover that translates to high recruitment costs, agents who quit shortly after onboarding is complete and inconsistent agent productivity.
- No cohesive workforce view that unites traditional agents, remote agents, and multiple sites – have to evaluate multiple inconsistent reports and manually pull reports together for management.
- Forecasting and scheduling are done separately – takes too long and is hard to adjust to accommodate shifting work requirements and shifting human resource pool.
- Call center supervisors and administrators spend much of their day handling individual employee scheduling requests.
- Inability to adjust scheduling and staff on the fly – leading to over-staffing costs and under-staffing (missed opportunities).
- Cannot track the total customer experience and the staff involved – limited visibility and control over back office customer engagement process creates additional work and perception of bad service within the contact center.
- Inability to match agent quality and performance with business outcomes – information needs to be manually reconciled and there is a lag between when a problem surfaces and when it can be corrected.
- Limited ability to gauge implication of future events (holidays, new projects, staffing level changes, organizational initiatives, weather events) on budgets, hiring need, and service level fulfillment – vulnerability to unexpected changes in business and workforce.
- Inability to identify the right training or the right time for training – limited to ad-hoc/generic training programs offered at times that are inconvenient or interfere with project work.
- Inability to measure “voice of the customer” as part of the customer engagement process – VOC is in a separate system and not linked to agent performance.

Back Office Operations

- Negative impact to service levels from back office operations.
- No visibility into fulfillment, such as how much time is spent on back office tasks – cannot track whether a service request has been completed and unable to make realistic customer promises on fulfillment.
- Inability to formulate KPIs for back office tasks – inability to track KPIs within back office operations and ensure that service levels that are promised by the contact center can be met.
- Inability to measure utilization levels of back office operations – unsure of whether the resources that are in place are sufficient for the work load.
- Inability to establish best practices for back office tasks and identify optimal workflows.
- Limited ability to gauge implication of future events (holidays, new projects, staffing level changes, organizational initiatives) on budgets, hiring need, and service level fulfillment – vulnerability to unexpected changes in business and workforce.
- Inability to identify the right training or the right time for training – limited to ad-hoc/generic training programs offered at times that are inconvenient or interfere with project work.

Benefits/Value Proposition

- Comprehensive workforce optimization capabilities spanning workforce management, performance management and quality management.
- Drive maximum effectiveness with lower cost-per-contact, increased sales and higher dollars collected in a collections or telesales environment.
- Drive maximum effectiveness within your back office operations through workflow management.
- Get visibility into back office fulfillment to complete your view into customer contact effectiveness.
- Model your staffing plans for all skill and all work products in multiple ways and implement the schedule that ensures you have the right staff at the right time throughout the day.
- Schedule staffs confidently – turn models and projections into real schedules and adjust scheduling on the fly.
- Involve employees in their own success – provide self-service tools and the right training at the right time.
- Seamlessly integrate contact center performance with employee metrics – measure employee intent, employee performance, and customer outcome.
- Workforce optimization capabilities uniquely tuned to realities of the contact center – take into account the subtleties of contact type (inbound, outbound, self-service) when scheduling your staff.
- Single view of all customer center work – front office, back office, across sites, and across agent types – provides a comprehensive view into how your staff is providing service.
- Ensure compliance and validate agent performance by leveraging secure voice and screen recordings.
- Comprehensive view into agent and back office performance through speech analytics, surveys, and operational metrics – delivered with over 100 basic reports and the ability for users to easily create more personalized views into their staff.
- Microsoft's familiar environment (Outlook, IM) ensures an easy fit within day-to-day tasks and existing technical environment of users.

Key Questions

- Are you able to identify the optimal staff schedule? Can you demonstrate and document trade-offs between performance metrics and staff costs?
- What is the make-up of your agent workforce? Do you dedicate agents to channels? Do you capture and use agent capabilities when allocating work?
- What is the make-up of your back office workforce? Do you dedicate resources to specific tasks? Do you dedicate resources to specific work outcomes? Do you capture and use resource capabilities when allocating work tasks?
- Do your agent performance metrics leverage multiple outcomes? Is agent performance limited to only what the agent is doing and when?
- Can you track back office operations as part of the overall customer contact work?
- Do you take the differences between your customer contact channels into account during scheduling?
- How are you identifying training and coaching opportunities?
- Do you consult multiple systems and multiple views to assess employee performance?
- Do you use multiple systems and multiple views for contact center and back office operations?
- Do you take customer outcomes (loyalty, satisfaction) into account when assessing employee performance?
- Can you empower your agents to manage their schedules without sacrificing the needs of the business?
- Are you able to maintain multiple forecasting models? Can you shift schedules to accommodate your forecast in real-time?
- Do you have an integrated view into all customer contact operations? Can you forecast, measure and adjust resources across all of your contact center sites and agents types without consulting multiple systems and views?
- How do you drive improvement in your processes?

ROI Elements

- Cost-per-contact (Collections/Telesales)
- Promises to pay (Collection)
- Revenue-per-contact (Telesales)
- First Call Resolution (Customer Service)
- AHT (Average Handle Time)
- Agent Turnover/Attrition
- Overtime Costs
- Right Party Contacts
- Occupancy rate
- FTE (Full Time Equivalents)
- Employee Satisfaction
- Schedule Adherence

Competitive Differentiation

Business Focused

- Workforce optimization built with the unique needs of the contact center in mind – multi-channel, multi-skill, front and back office.
- Inherent ability to take next generation customer contact needs (multi-channel, unified communication) into account.
- Powerful forecasting and staff modeling and what-if scenario capabilities create schedules that account for the unexpected.
- Ability to leverage business requirements and employee preferences as part of the scheduling process.
- Leverage all metrics to inform your workforce understanding – customer surveys, voice and screen recordings, data from your communication infrastructure – natively.
- Ability to trigger employee intervention automatically by using data and business rules to trigger alerts, initiate coaching or put performance plans into action.
- Full visibility into your contact center performance and efficiency across sites, agent-types, and work product (front office/back office).

IT Focused

- Open and non-proprietary – leverage your existing call center investments.
- Seamless fit with Aspect Unified IP – single environment for all your contact center needs
- Single source for service and support (one throat to choke)
- Reduce need for custom integration across applications/workforce optimization capabilities.
- Minimize system fragility caused by proprietary hardware and non-standard operating environment
- Familiar technology environment (Microsoft Outlook, IM) for end-users – easier adoption, less training, integrate into day to day operations
- Native use of encryption to safeguard personal data (recordings) leveraging standard protocols.

Public Assets

Customer Examples

An organized list of available case studies can be found here: [Aspect Case Study Guide](#)

This case study guide is updated quarterly and is sortable by product, pathway, industry, business process, and more.

White Papers

Title and Link	Usage Guidelines
Business Focused	
5 Ways to Optimize Your Workforce for Customer Contact in a Social Marketplace	<ul style="list-style-type: none"> • Workforce Optimization in the context of next generation customer contact • Use to generate interest in total workforce optimization solution coupled with unified communication technologies
At-Home Contact Center Agents –Making the Right Decision	<ul style="list-style-type: none"> • Practical white paper on preparing your contact center for home-based agents • Discusses both workforce optimization considerations as well as the need for unified communication technology • Helps build out the business use case for at-home agents and provides some guidance to IT as well (mostly business-focused) • Includes a couple of short case-studies within the white paper as proof points
Moving from Zero to 90 in 60 Seconds	<ul style="list-style-type: none"> • Overview of workforce optimization – all capabilities – as it fits both the customer service business as well as the collections/telesales business • Use as an introductory education piece for customers looking to understand the benefit of workforce optimization and to help position the entire solution and/or for up-sell to total solution
From Workforce Management to Workforce Productivity	<ul style="list-style-type: none"> • Positioning performance management as the cornerstone of workforce optimization • Help show how workforce optimization technologies evolving through analytics – moving from focus on cost containment to a focus on productivity improvement • Use to generate interest for WFO suite for customers who have purchased workforce management
Performance Management: Tools that Drive Action, Not Just Reports	<ul style="list-style-type: none"> • InsightOn paper that focuses on performance management • Use as education piece
At-home Agents and the Virtual Contact Center	<ul style="list-style-type: none"> • InsightOn paper that focuses on tools for the at-home agent pool • Use as education piece for customers looking to begin at at-home agent initiative or those looking to expand their at-home agent pool
What Contact Centers Can Teach the Rest of the Organization about Unified Communications	<ul style="list-style-type: none"> • InsightOn paper that focuses on the benefits of unified communication within the context of workforce management • Use to position the value of unified communications to workforce management/WFO customers
Making the Back Office Pay	<ul style="list-style-type: none"> • Positioning the value of expanding WFO usage to the back office • Use to generate interest and demonstrate thought-leadership for WFO prospects • Use to position and demonstrate the benefit of unified communication and workforce optimization
Beyond Workforce Management	<ul style="list-style-type: none"> • This is a companion piece to From Workforce Management to Workforce Productivity • This can be used as a follow-on/deeper-dive to the overall messaging around the integrated WFO suite
Speech Analytics – Bridging the Great Unknown	<ul style="list-style-type: none"> • InsightOn paper on leveraging speech analytics within the call center setting • Use as education piece for customers interested in Aspect's speech analytics capabilities
Work Smarter, Not Harder	<ul style="list-style-type: none"> • Use to build awareness and interest for workforce optimization for collections/telesales customers and prospects • Focus on right party contacts and list management along with workforce management, performance and quality

Title and Link	Usage Guidelines
Contact Center Intelligence	<ul style="list-style-type: none"> • Use as education piece for customers/prospects looking to understand what the components of workforce optimization are and how they contribute to overall value
IT Focused	
Disaster Recovery – Is Your Contact Center Prepared?	<ul style="list-style-type: none"> • InsightOn paper that defines disaster recovery and options for back-up systems • Use as education piece for business on what disaster recovery means in the context of contact center technology
Standards in the Contact Center: Why You Should Care	<ul style="list-style-type: none"> • InsightOn paper authored by Mike Sheridan on the importance of IT standards in the context of contact center technology • Use as an education piece for business on the value of standards-based technology to support Aspect positioning within the IT space
The Aspect® Unified IP® Five 9s Environment	<ul style="list-style-type: none"> • This paper focuses on the definition of Five 9s from a business perspective and outlines how Aspect technology ensures key business processes are kept from failing • Use as an education piece for the business on the importance of Five 9s and an introductory piece for IT
The Aspect® Unified IP® Five 9s Environment – Technical Overview	<ul style="list-style-type: none"> • Use for IT – companion piece to The Aspect® Unified IP® Five 9s Environment • Technical piece that defines how Aspect technology supports high reliability

Internal-Use Assets ([OASIS Workforce Optimization Pathway](#))

- Product Overview: [Productive Workforce](#)
- Customer Service CUSTOMER presentation: [Strategies for Better Customer Service](#)
This presentation consolidates the Aspect story around customer service. It is both interaction management (Unified IP – inbound and outbound) as well as WFO combined into a presentation that addresses how Aspect technologies as a whole influence and improve the customer service process. This presentation is available in additional languages. Please search for “Strategies for Better Customer Service” on OASIS.
- [Business Discovery Questions](#)
- [ROI Calculator](#)
- Competitor Summary
 - [Aspect’s Workforce Optimization Advantages](#)
- Additional Competitive Information ([aspectnet](#))
- Competitive Battle Cards
 - [NICE](#)
 - [Verint](#)
- Pricing
 - [Workforce Optimization License Guide](#)
- [Proposal \(High Quality Printing\)](#)
- [Proposal \(Email Quality\)](#)

High Level Demo Scenarios

Key Message	Value Proposition	Target Audience	Highlighted Features	ROI Metrics	Competitive Differentiators to Highlight
<p>Workforce Optimization Capabilities Give you the Means to Increase Agent Performance</p> <p>(Collection and Sales Focused – Where Agents Are Getting \$\$)</p>	<p>Ensure you are maximizing agent response across all contact channels while ensuring compliance with regulations</p>	<p>VP of Operations, Director Contact Center</p> <p>(Collections and Telesales)</p>	<p>Call recording and quality management call reviews & encryption (regulatory compliance)</p> <p>Using historical right party contacts (RPC) and best time to call information to forecast and schedule</p> <p>Capture back-office fulfillment tasks (sending out payment schedule for collections, sending out product brochure for telesales)</p> <p>Unified report showing agent call times, promise to pay or lead, schedule compliance</p>	<p>Customer Outcome/Agent (\$ Collected, Sales)</p> <p>Right Party Contacts</p> <p>Schedule Adherence</p>	<p>Power in scheduling – forecasts/what ifs – two step scheduling approach</p> <p>Back office integration</p> <p>Unified reporting</p>
<p>Workforce Optimization Helps Focus Agents on the Customer</p> <p>(Customer Service Focused)</p>	<p>Ensure your staff – both front and back office – is focused on customer need with full visibility into agent performance and customer experience.</p>	<p>VP of Operations, Director Contact Center</p> <p>(Customer Service)</p>	<p>Multi-channel contact scheduling</p> <p>Skill-based scheduling</p> <p>Customer satisfaction survey</p> <p>Multi-site reporting/management (UCC)</p> <p>Quality-driven coaching identification and delivery</p> <p>Self-scheduling and bidding</p>	<p>Customer Outcome/Agent (Satisfaction)</p> <p>Schedule Adherence</p> <p>Average Handle Times</p> <p>First Call Resolution</p> <p>Employee Satisfaction</p>	<p>Integrated survey capabilities</p> <p>Unified reporting</p> <p>Power in scheduling – forecasts/what ifs – two step scheduling</p> <p>Employee Enablement – Self-Scheduling</p>

Migration Solution Configuration Samples for WFO

The table below presents a high-level view into the product configurations typical for this pathway based on high-level customer profile. Please note that each customer situation is unique and the ultimate product configuration chosen for the customer should be determined after an in-depth business requirement scoping.

Customer Profile	Lead With...
Customer has 1+ Aspect dialer(s) and 1+ Aspect ACD(s). Customer either lacks WFM or is open to replacing their existing WFM solution.	Blended Interaction™ with 100% voice blend. This solution will enable the customer to leverage down time for outbound with ability to switch to 100% inbound on demand. Can achieve higher agent utilization by allocating portion of team to chat, email and IM. To ensure consistency across all channels, desktop scripting would be a key advantage to position. Position as unified solution with key synergies between functions.
Customer has competitive ACD/Dialer (ie Avaya, Cisco)	Lead with WFO and position unified for comprehensive solution
Customer has Aspect Unified IP and competitive or missing WFO	Productive Workforce