CASE STUDY

# A Unified Workforce Management Operation: $10.3M in Projected Savings

How COPC's Managed Services Helped a Global Consumer Software Company Centralize and Optimize Its Workforce Management Operation

**$10.3M**
Projected 3-Year ROI

**+17 Points**
Improved Occupancy

**53%**
Reduced Productive FTE Hours

## About the Client

The client is a large, globally recognized consumer software company that sells a subscription service to customers in dozens of countries. To keep pace with rapid growth, the company had scaled its customer support through a network of multiple BPO partners spanning voice and chat, together totaling 1,000+ agent seats.

## The Challenge

The client had built a large, multi-partner support operation at speed, but it lacked a centralized internal workforce management (WFM) function; there was no single point of coordination across its partners, and performance depended on how each one planned and staffed on its own. The objective was to create an in-house WFM capability so the operation could be planned and coordinated as one unified function, delivering a consistent customer experience as it continued to grow.

- **WFM was managed by the partners**. Several key challenges highlighted the need for a unified approach to WFM. With forecasting, scheduling, and routing owned across six BPO partners, the client had no single internal vantage point from which to coordinate them or hold the teams to one consistent set of targets.

- **Planning was distributed across the network**. Each partner forecasted and planned headcount independently, so capacity decisions were not aligned across partners.This created uneven use of resources and, at peak times, longer customer wait times. Partners also received forecasts on short lead times, limiting how far in advance staffing could be optimized. All of these issues put pressure on contractual service commitments.

- **Routing followed fixed ratios**. Calls were distributed using fixed, manually set allocation ratios rather than real-time agent availability, and English-language support was organized into separate technical support, retention, and fraud queues. Therefore, service levels and occupancy varied across partners even when capacity was available elsewhere in the network.

- **Performance visibility spanned multiple systems**. Forecasting lived largely in spreadsheets, and reporting ran across two separate automatic call distribution (ACD) platforms, so leadership did not yet have a single, unified view of performance across voice and chat.

# The Solution

COPC delivered an end-to-end managed WFM service: standing up the operation, managing daily activities, building the tools and playbook to sustain it, and ultimately transferring full capability to the client's internal team.

## Created the infrastructure and ran the operation

COPC developed a dedicated team to run day-to-day WFM across every channel, language, and BPO partner. That included long-term and interval-level forecasting, capacity planning, real-time resource coordination and monitoring, service-level management, daily operational calls with all partners, and weekly capacity and vendor management coordination.

## Redesigned the routing

COPC replaced fixed-ratio call distribution with dynamic, availability-based routing that evaluated agent availability against queued calls in real time. It then consolidated the segregated English queues into a universal-agent model, so technical support, retention, and fraud draw from a shared pool. As a result, every contact reached the next available agent across all partners.

## Built the playbook and internal capability

COPC built the client's WFM operating guide, defined KPIs aligned to the COPC Customer Experience (CX) Standard, trained both client and partner staff, and deployed all core WFM processes end-to-end.

## Selected the enterprise platform

Through a structured, vendor-agnostic evaluation of four platforms (34 requirements across five priority tiers, seven demo scenarios, and six independent evaluators), COPC led the selection of a large enterprise WFM platform and provided senior engineering oversight through implementation.

## Managed the vendor's transition

In parallel, COPC coordinated a full BPO transition, guiding the exit of two legacy providers and the onboarding of three new partners with no sustained service disruption.

# Results

During the 18-month engagement, the client transitioned from a distributed, partner-run model to a mature, centralized WFM operation, achieving measurable gains in service, efficiency, and forecasting that resulted in a substantial projected financial return.

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|---|---|---|
| **63%-80%**<br>Occupancy (+17 points) | **13.6%-0.2%**<br>Call transfer rate<br>(~116K transfers eliminated) | **–53%**<br>Productive FTE hours |
| **94%**<br>Volume forecast accuracy<br>(30-week avg) | **8 Weeks**<br>To restore service levels<br>after a staffing dip | **100%**<br>WFM processes fully<br>transitioned |

**PROJECTED 3-YEAR ROI**

**$10.3M**

*Projected net savings over three years, modeled on static volume to isolate the operational benefit*

| | | |
|---|---|---|
| **17x**<br>Return on Platform Cost | **$3.4M**<br>Annual Net Savings | **$216K**<br>Annual Platform Cost |

# Conclusion

The client now operates a mature, centralized WFM function on an enterprise platform, with balanced service levels across all partners, disciplined forecasting, and dramatically improved agent utilization. COPC built the playbook, deployed the processes, and completed a full knowledge transfer, so the client's internal team is equipped to sustain and build on these gains independently, without ongoing external support.

**About COPC Inc.**

Founded in 1996, COPC Inc. is the global authority on transforming customer experience (CX) operations. As the pioneer of CX certification and the architect of the COPC CX Standard, the company provides the rigorous management framework iconic brands rely on to unify the service journey across every channel. COPC Inc. is the only firm that provides all the advisory, research, training, certification, technology and implementation expertise necessary to bridge the gap between high-level CX strategy and operational execution. By taking a methodical, journey-first approach, COPC Inc.'s seasoned experts do more than just deliver a strategy; they implement the required changes to optimize performance, drive brand loyalty, and future-proof CX operations. COPC Inc. is headquartered in Winter Park, FL, United States, with operations in Europe, the Middle East, Africa, Asia Pacific, the Americas, India, and Japan. www.copc.com


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