CASE STUDY

Workforce Management Platform Selection for a Global Consumer Software Operation

COPC Inc. partnered with the client to evaluate, select, and negotiate a workforce management platform, resulting in **$10.26 million** in net savings over three years.

About the Client

The client is a subscription-based consumer technology company operating worldwide. Its customer support organization handles high contact volumes in multiple languages across several global markets. The client is a subscription-based consumer technology company operating worldwide. Its customer support organization handles high contact volumes in multiple languages across several global markets. Customer interactions are managed through a network of BPO partners, handling approximately 4 million voice contacts and over 400 thousand chat interactions each year.

34	~4M	400K+	1,000+
Requirements Defined	Voice Contacts/Yr	Chat Contacts/Yr	Agents

Client Challenge

The client's consumer support group lacked an internal workforce management (WFM) team, a WFM platform, and a centralized forecasting capability. The operation relied entirely on Excel-based processes, which introduced risk at every step:

- Manual forecasting in Excel was error-prone and consumed hours on validation with version control risk across multiple file locations.
- Allocation across day-of-week, interval, and supplier was entirely manual for each BPO partner.
- No intraday visibility existed across BPO partners, leaving staffing decisions reactive rather than proactive.
- Supplier accountability was manual, with uploads to Databricks and reporting built from two separate ACDs—one for voice and one for chat.
- BPOs had no external framework for measuring schedule attainment by the vendor.

The complexity of the environment made this more than a simple software purchase. The client needed a partner who understood contact center operations at a deep level to define the right requirements, evaluate vendors objectively, and ensure the chosen platform could handle the multi-supplier, multi-channel architecture.

COPC's Approach

COPC brought a structured, requirements-driven methodology to every phase of the selection process.

Requirements Definition

Before contacting any vendor, COPC worked with the team to define and prioritize 34 functional requirements across five priority tiers. Twelve requirements were classified as P1 (critical), meaning a vendor had to satisfy them to remain in contention. These included single-platform voice and chat support, intraday reforecast capability, BPO-level parent-child forecast structures, and real-time agent tracking.

Native Platform WFM Assessment

Because the client already ran voice on their existing contact center platform, the first question was whether the platform's native WFM tool could could meet their needs. COPC conducted a working session with the platform vendor and determined the native solution was not a fit. It could not subdivide queues across suppliers, offered no centralized scheduling view, and was not price-competitive at scale.

Vendor Evaluation

Four vendors submitted full proposals and completed live demos against the client's use cases. COPC designed seven standardized demo scenarios weighted by operational importance. Forecast Allocation, the most critical capability for the client's multi-BPO environment, carried 25% of the total weight. Forecast Creation carried 20%.

Six independent evaluators scored each vendor session using a structured rubric on a 0–10 scale. Scoring rubrics were shared with vendors in advance. This approach eliminated cherry-picked demos and ensured every vendor was measured against identical operational scenarios.

Pricing and ROI Analysis

COPC built three-year ROI models comparing labor savings, tool cost, and support fees. The analysis modeled improvements in forecast accuracy (90% to 95% for voice) and occupancy (75% to 85% for voice) against contact volumes of approximately 4 million voice and over 400,000 chat interactions annually.

Evaluation Results

Vendor 1 led the evaluation across nearly every dimension. The table below shows the final rankings by scenario, with cumulative scores from all six evaluators.

Scenario (Weight)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Max
Forecast Creation (20%)	**307**	269	257	258	360
Forecast Allocation (25%)	**158**	144	132	140	200
Intraday Performance (15%)	**246**	229	238	224	320
Staff Loading (10%)	**123**	116	108	112	160
Reforecast (10%)	**119**	112	127	112	160
Reporting (10%)	**202**	200	189	194	240
UI & Security (10%)	**159**	168	166	120	240
TOTAL	**1,295**	**1,217**	**1,210**	**1,108**	**1,680**

Vendor 1 finished first overall with 1,295 points, 78 points ahead of the second-place vendor. Vendor 1 ranked first in five of seven categories, including both most heavily weighted scenarios.

Pricing and Negotiation

COPC leveraged its vendor relationships and competitive intelligence to drive significant pricing improvements for the client throughout the negotiation period. Through competitive positioning and direct negotiation, COPC drove a substantial reduction in the selected vendor's annual licensing costs from the initial proposal to the final agreement. Implementation fees were also negotiated in the licensing package at no additional charge.

ROI Analysis

COPC modeled labor savings from improved forecast accuracy and occupancy gains against tool and support costs. The three-year projection showed compounding returns as operational improvements matured.

Year 1	Year 2	Year 3	3-Year Average
10.2X ROI ratio	**17.5X** ROI ratio	**23.2X** ROI ratio	**17.0X** ROI ratio
$2.05M net savings	**$3.53M** net savings	**$4.68M** net savings	**$10.26M** Total net savings

Key Assumptions

Contact Volume: ~4M voice / 400K+ chat annually
Occupancy Increase: 75% → 85% (voice) over 3 years
Forecast Accuracy: 90% → 95% (voice) over 3 years
AHT: 17 min. (voice), 20 min. (chat)

The Recommendation

COPC recommended Vendor 1 based on:

- **Best-in-class BPO allocation.** Vendor 1's parent-child forecast structure handled six-BPO setup with dynamic allocation by individual BPO hours, AHT, and volume splits.
- **AI-powered forecasting.** Vendor 1's engine led on AI-driven forecasting accuracy and intraday reforecast, automatically detecting trends and adjusting staffing recommendations in real time.
- **Strongest scores where it mattered most.** Vendor 1 scored highest in Forecast Creation (20% weight) and Forecast Allocation (25% weight), the two scenarios most central to the client's operational needs.
- **Proven integration path.** Vendor 1 presented a clear implementation plan for the existing voice and chat platforms.
- **Superior ROI.** $10.26 million in projected net savings with a 17x three-year return.

Why COPC

This engagement illustrates several capabilities that COPC brings to technology advisory and vendor selection work:

- **Requirements-first methodology.** COPC defined and prioritized 34 requirements before contacting any vendor. This kept the evaluation objective and anchored it to operational realities, not vendor sales pitches.
- **Vendor-agnostic evaluation.** COPC ensured unbiased reviews and recommendations by scoring every vendor against the same scenarios, using the same evaluators and the same rubric.
- **Pricing leverage.** COPC used competitive intelligence and vendor partnerships to drive pricing improvements, delivering significant savings beyond what the client could have negotiated on its own.
- **Deep contact center expertise.** COPC's understanding of WFM operations, BPO management, and multi-channel forecasting meant the client did not need to build internal expertise before making a platform decision.

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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