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CONTACT CENTER WORKFORCE MANAGEMENT

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PREFACE

Workforce management (WFM) has always been vital to contact center success. However, the pandemic reshaped how we approach it, introducing new challenges and opportunities. With the rise of hybrid, in-person, and work-at-home models, smart WFM is more critical than ever. This report, based on a global executive survey, explores current WFM approaches and strategies for achieving consistent performance while balancing costs.

Effective WFM ensures that the right number of staff with the right skills are available at the right time and place. This not only enhances service delivery but also optimizes operational costs. In the context of contact centers, this translates to improved customer satisfaction, reduced employee burnout, and greater overall efficiency.

Our research offers valuable insights into critical aspects of WFM, including technologies, forecasting techniques, key performance metrics, and a comparison between in-house contact centers and business process outsourcers (BPOs).

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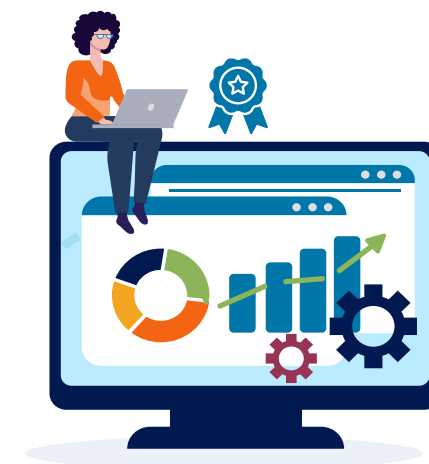
KEY FINDINGS

Key Challenge

• Fifty-one percent of the respondents see improving efficiency as a challenge, which is strongly related to WFM.

Use of Technology

• Seventy-two percent of respondents report their organization uses a tool/software for WFM, with 66% expressing satisfaction with their WFM tool.

• Scheduling, staffing planning and adherence management are the top applications of WFM tools within the organizations.

• Twenty-seven percent of respondents said their organizations use virtual hold technology (VHT).

Forecasting

• Eighty-seven percent of respondents said they forecast volumes, while 85% said they forecast handle times.

• Forty-one percent of respondents said their organization used both historical data and budgeted shrinkage to forecast shrinkage.

• Twenty-eight percent of respondents stated their long-term forecasts cover plans for more than 12 months, while 50% said their short-term forecasts cover plans for up to one month.

Staffing Requirements

• Thirty-eight percent of respondents mentioned that their organization used all three types of forecasts (volume, handle time and shrinkage) for scheduling.

• Eighty-five percent of organizations use up to 30-minute interval periods to calculate staffing requirements for inbound calls; 73% use this interval for a chat.

• Seventy-two percent of organizations follow a structured approach for real-time management, which includes actions such as rescheduling coaching, training or meetings.

Metrics

• Ninety-eight percent of the respondents measure service level. A similar percentage of respondents reported measuring average handle time.

• Ninety-five percent and 85% of respondents state they measure attrition and absenteeism, respectively.

• Less than 80% of the respondents state their organization measures staffing forecast accuracy and scheduling forecast accuracy.

CHALLENGES

WFM−RELATED CHALLENGES ARE COMMON AMONG CONTACT CENTERS

Which of the following challenges is your organization facing in service delivery? (Select all that apply.)

■ WFM related challenges

Challenge	%
Improving customer experience	51%
Improving efficiency	51%
Budgetary constraints/expecting to do more with less	47%
Staff turnover	46%
Training/agent development	46%
Reducing costs	43%
Improving first contact resolution	39%
Difficulty in recruiting staff	38%
Integrating multiple service channels	31%
Inadequate headcount to effectively meet business requirements	28%
Introduction of new service channel(s)	25%
Maximizing upsell/cross-sell opportunities	25%
Organizational or contact center restructuring	24%

Most of the common challenges respondents report are directly or indirectly related to WFM and are commonly encountered by contact centers.
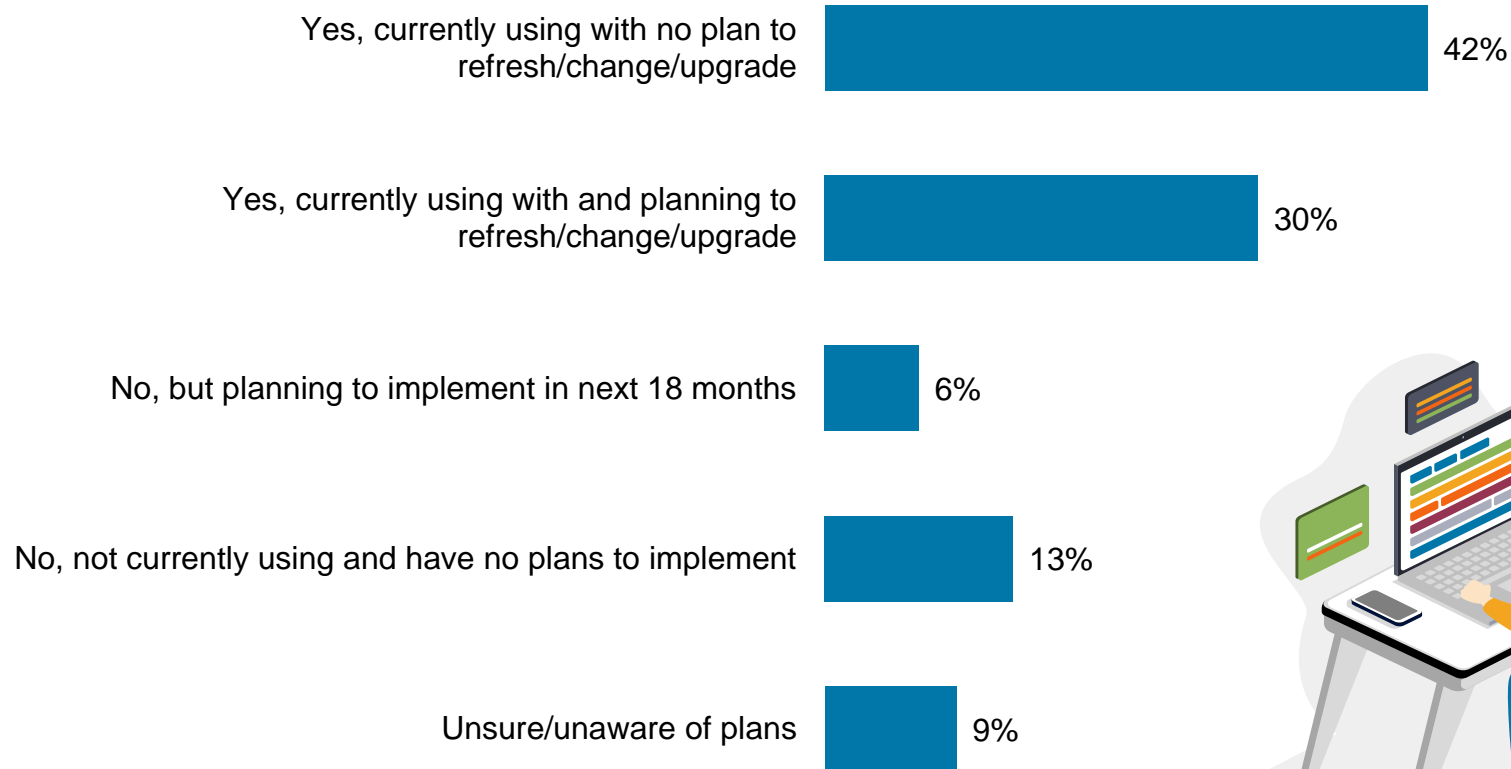
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WORKFORCE MANAGEMENT TECHNOLOGIES

- Technologies for WFM

- WFM Software

- Virtual Hold Technology (VHT)

TECHNOLOGY FOR WORKFORCE MANAGEMENT
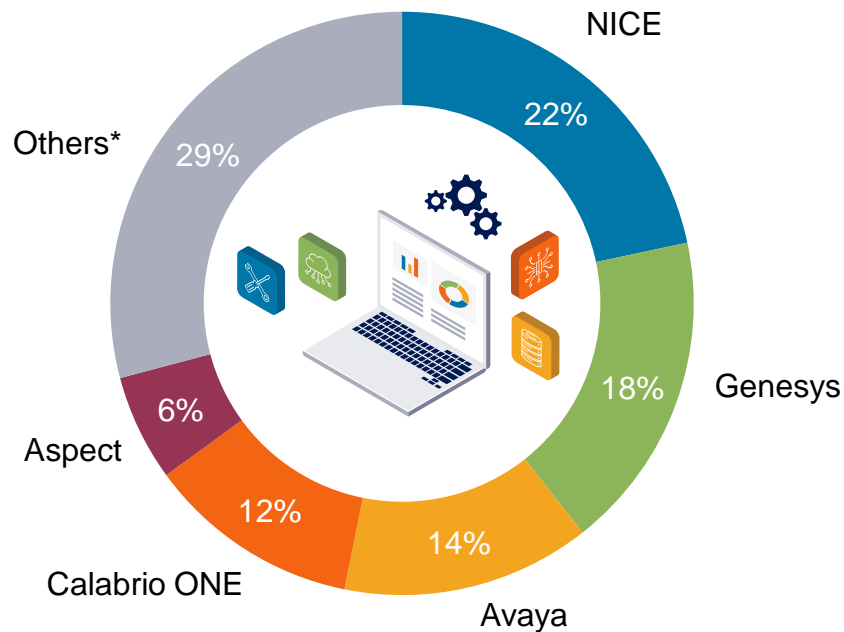
Do you use a workforce management tool?

Yes, currently using with no plan to refresh/change/upgrade — 42%

Yes, currently using with and planning to refresh/change/upgrade — 30%

No, but planning to implement in next 18 months — 6%

No, not currently using and have no plans to implement — 13%

Unsure/unaware of plans — 9%

72% of the surveyed executives stated that their organizations use software for workforce management.

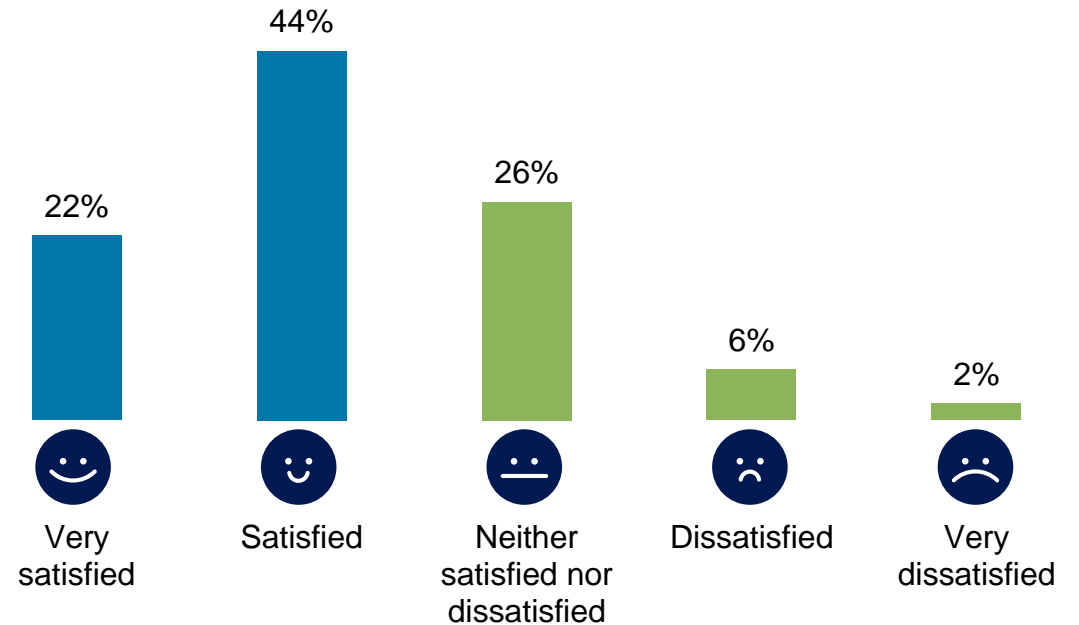# WORKFORCE MANAGEMENT TOOL PROVIDERS AND EXPERIENCE WITH THEM

What is the primary workforce management tool that you use?

- NICE 22%
- Genesys 18%
- Avaya 14%
- Calabrio ONE 12%
- Aspect 6%
- Others* 29%

Overall, how satisfied are you with your primary workforce management tool?

- Very satisfied 22%
- Satisfied 44%
- Neither satisfied nor dissatisfied 26%
- Dissatisfied 6%
- Very dissatisfied 2%

66% of the surveyed executives stated they are satisfied with their workforce management tool.

* Others include in-house solutions, Playvox, Five9, Verint, Alvaria, etc.

APPLICATION OF WORKFORCE MANAGEMENT TOOLS
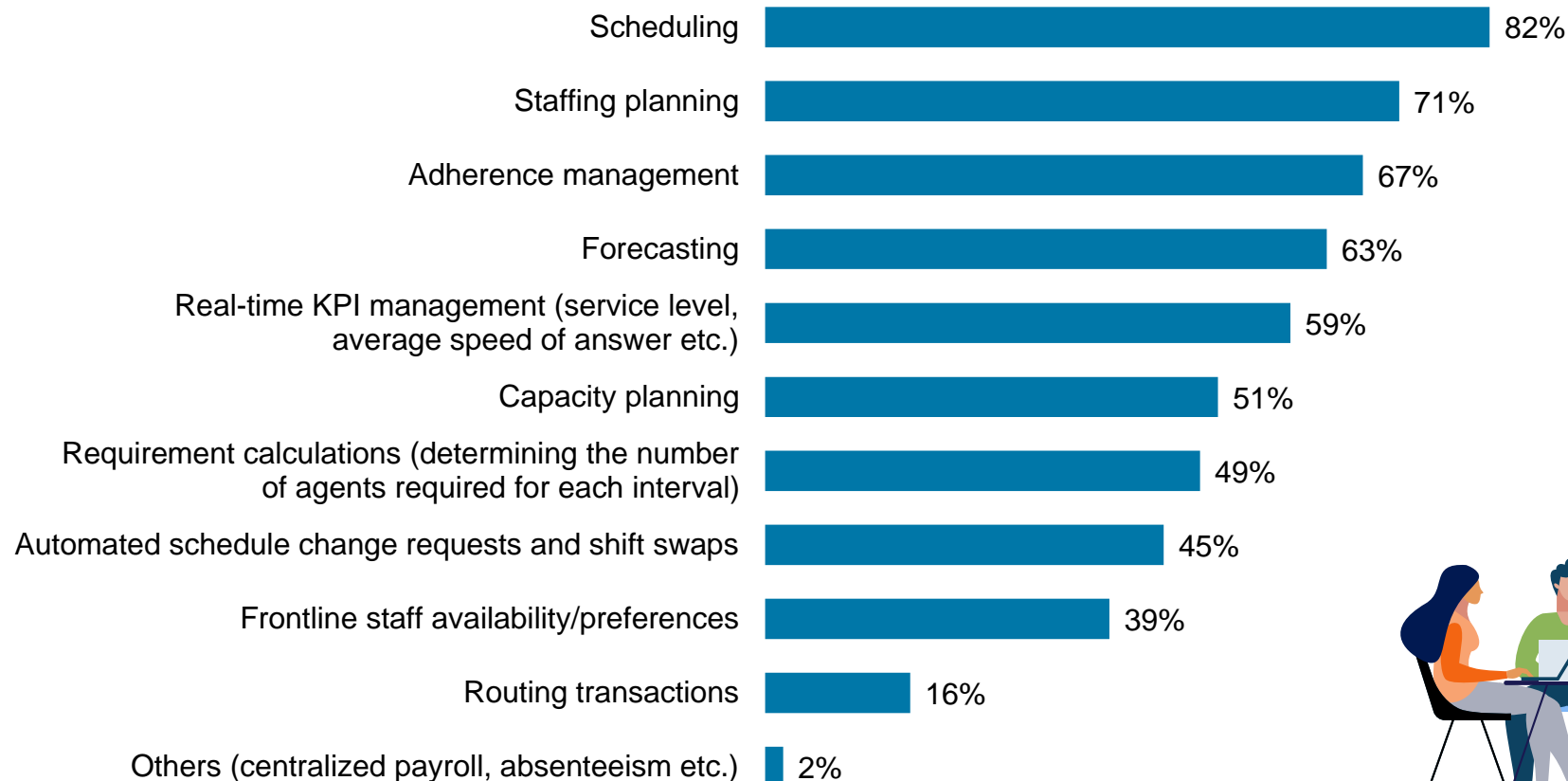
For which of the following do you use your primary workforce management tool? (Select all that apply.)

| Function	Percentage
Scheduling	82%
Staffing planning	71%
Adherence management	67%
Forecasting	63%
Real-time KPI management (service level, average speed of answer etc.)	59%
Capacity planning	51%
Requirement calculations (determining the number of agents required for each interval)	49%
Automated schedule change requests and shift swaps	45%
Frontline staff availability/preferences	39%
Routing transactions	16%
Others (centralized payroll, absenteeism etc.)	2%

60% of respondents indicate that their organizations utilize a WFM tool for the top three functions: scheduling, staffing planning and adherence management.

Furthermore, 80% of respondents reported that the WFM tool is employed for at least three of these purposes.

MANAGING BLENDED AGENTS AND CONCURRENT CHATS

Does your workforce management tool automatically handle blended agents (agents who support more than one channel)?
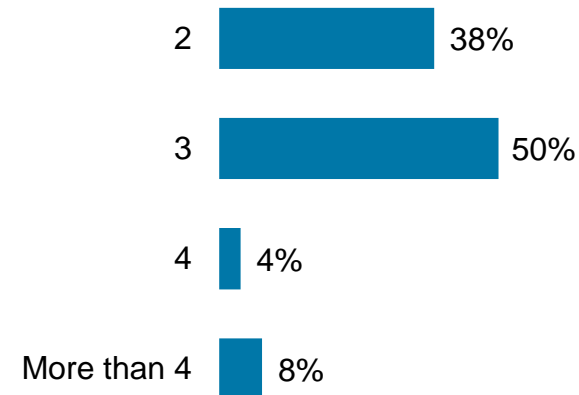
- Yes — 73%
- No — 14%
- Don't know — 13%
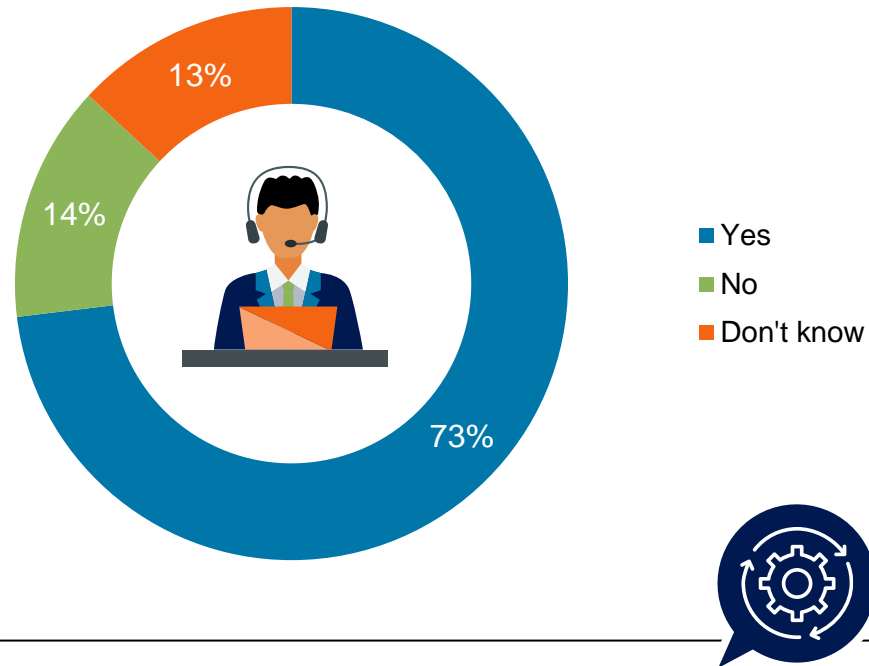
Around three-fourths of the respondents stated that their WFM tool automatically handles blended agents.

**Does your workforce management tool take concurrency into account when planning for chat?**

Yes 51%	No 23%	Don't know 26%

What is the maximum number of chats an agent is allowed to handle concurrently?

- 2 — 38%
- 3 — 50%
- 4 — 4%
- More than 4 — 8%

Half of the respondents say their WFM tool considers concurrency when planning for chats, with 62% stating that agents can handle three or more chats concurrently.

USE OF VIRTUAL HOLD TECHNOLOGY (VHT)

Do you use virtual hold technology?

27%

38%

35%

- Yes
- No
- Don't know/not sure
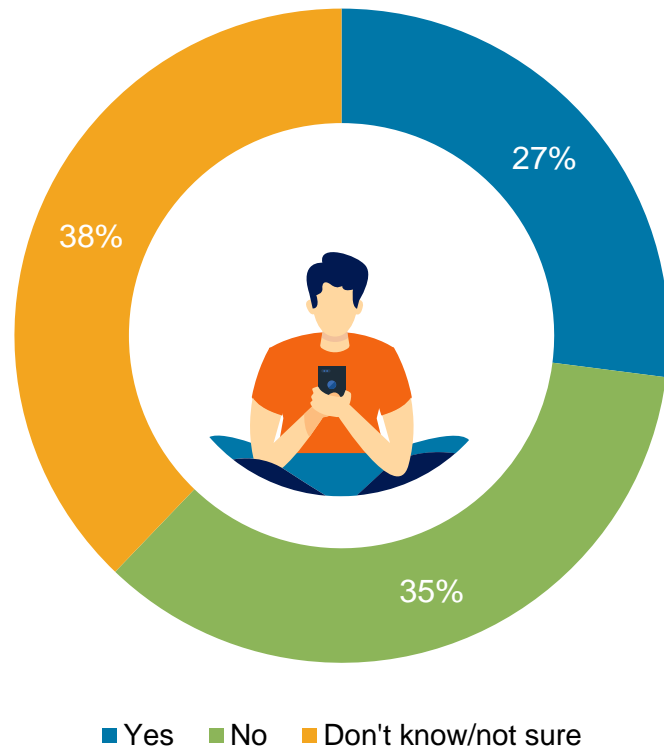
A little over one-fourth of respondents reported using VHT.

The benefits of VHT are twofold. Customers save the time they would otherwise spend on hold, and contact centers adjust resources in response to changing call volumes.
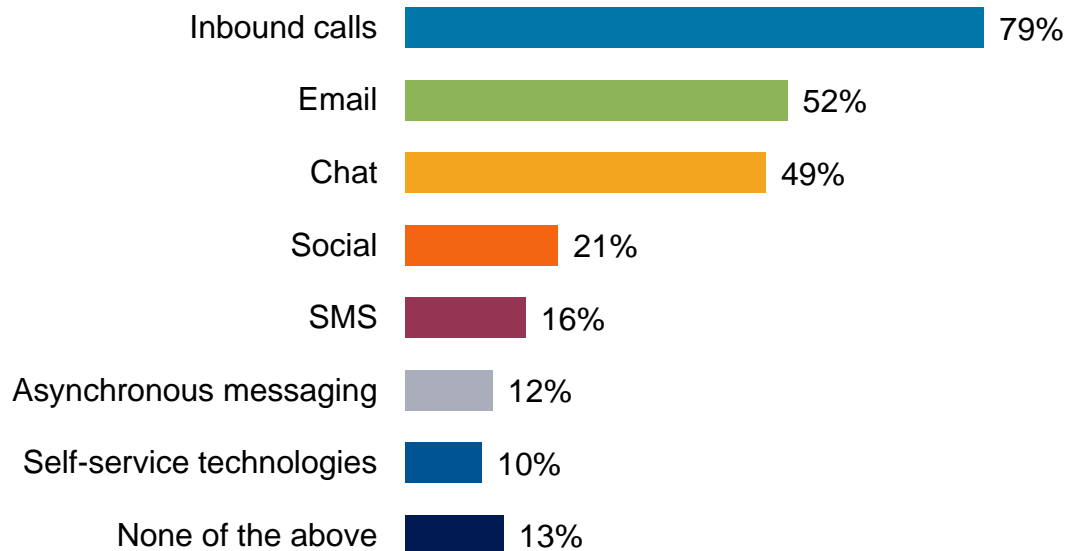
FORECASTING

- Volume and Handle Time

- Shrinkage
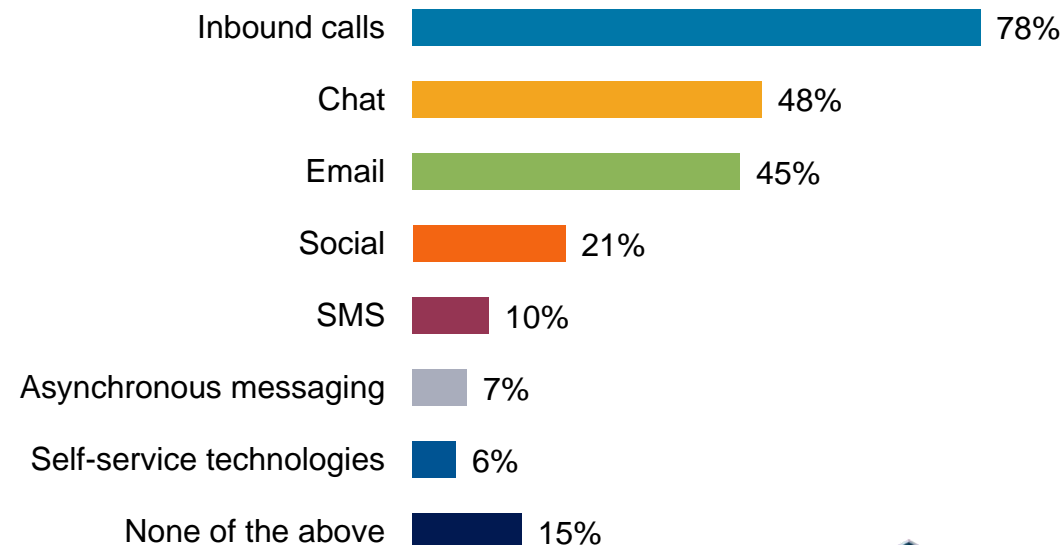
- For Long and Short Term

FORECASTING VOLUME AND HANDLE TIME

Which of the following do you forecast for? (Select all that apply.)

Volumes

Channel	%
Inbound calls	79%
Email	52%
Chat	49%
Social	21%
SMS	16%
Asynchronous messaging	12%
Self-service technologies	10%
None of the above	13%

Handle Times

| Channel	%
Inbound calls	78%
Chat	48%
Email	45%
Social	21%
SMS	10%
Asynchronous messaging	7%
Self-service technologies	6%
None of the above	15%

COPC CX Standard for Contact Centers 7.0 requires customer care organizations to develop forecasts for all human-assisted channel transactions using historical volume, handle time and shrinkage data.

49% of respondents indicated that their organizations forecast volumes for inbound calls, chats, and emails. Meanwhile, 40% reported that their organizations also forecast handling times for these three communication channels.

FORECASTING SHRINKAGE

How do you forecast shrinkage?

- 6%
- 4%
- 49%
- 41%
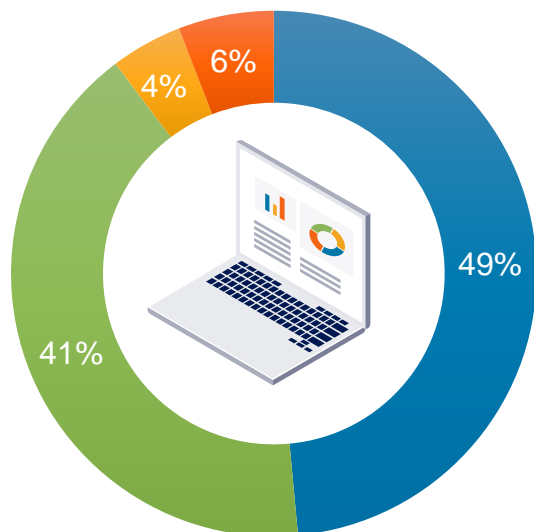
■ We use both historical data and budgeted shrinkage

■ We use historical data

■ We use budgeted shrinkage

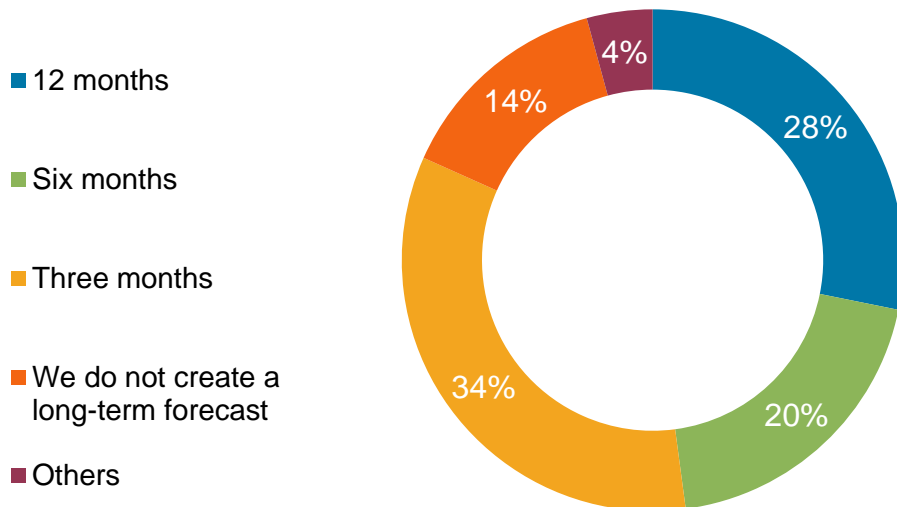■ We do not forecast shrinkage

COPC CX Standard for Contact Centers 7.0 requires customer care organizations to develop forecasts for all human-assisted channel transactions using historical volume, handle time and shrinkage data.
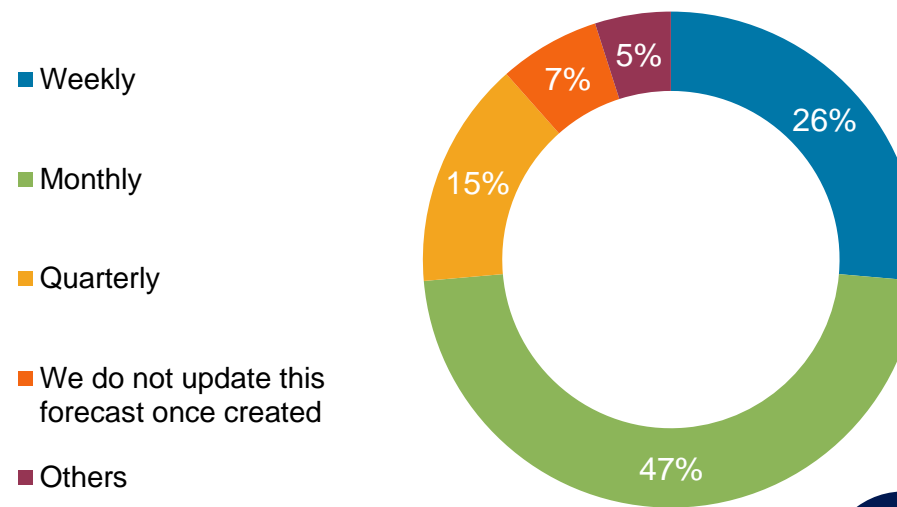
49% of respondents indicated that their organizations used historical data and budgeted shrinkage to forecast shrinkage. Notably, a significantly higher percentage of executives from BPOs (68%) employ this approach compared to in-house centers (33%).

FORECASTING FOR LONG-TERM

How far in advance do you create your long-term forecast?

- 12 months
- Six months
- Three months
- We do not create a long-term forecast
- Others

28%
20%
34%
14%
4%

How often do you update this long-term forecast with the most recent information?

- Weekly
- Monthly
- Quarterly
- We do not update this forecast once created
- Others

26%
47%
15%
7%
5%

48% of respondents indicated that they develop long-term forecasts six months or more in advance. In contrast, 14% reported that their organizations do not create such forecasts.

Among those organizations that do, 47% update their forecasts monthly with the latest information

* Others: 2 months, 15 months, etc.

FORECASTING FOR SHORT-TERM

How far in advance do you create a short-term forecast (used for scheduling agents)?

Legend:
- One month
- Two weeks
- One week
- We do not create a short-term forecast
- Others

Chart values: 50%, 21%, 18%, 3%, 8%
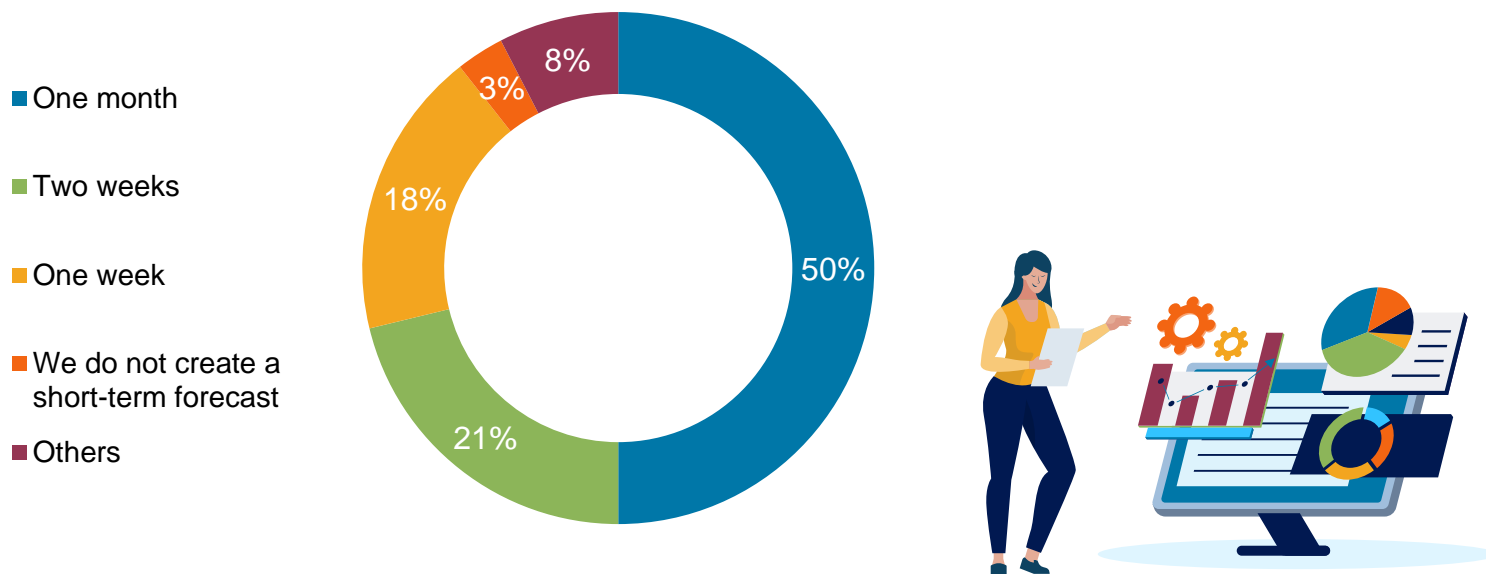
COPC CX Standard for Contact Centers 7.0 requires customer care organizations to develop capacity plans to determine the number of staff needed to handle the predicted number of transactions. Accordingly, the plan must be created with enough time to recruit and train new staff.

39% of respondents indicated preparing short-term forecasts at least two weeks in advance.
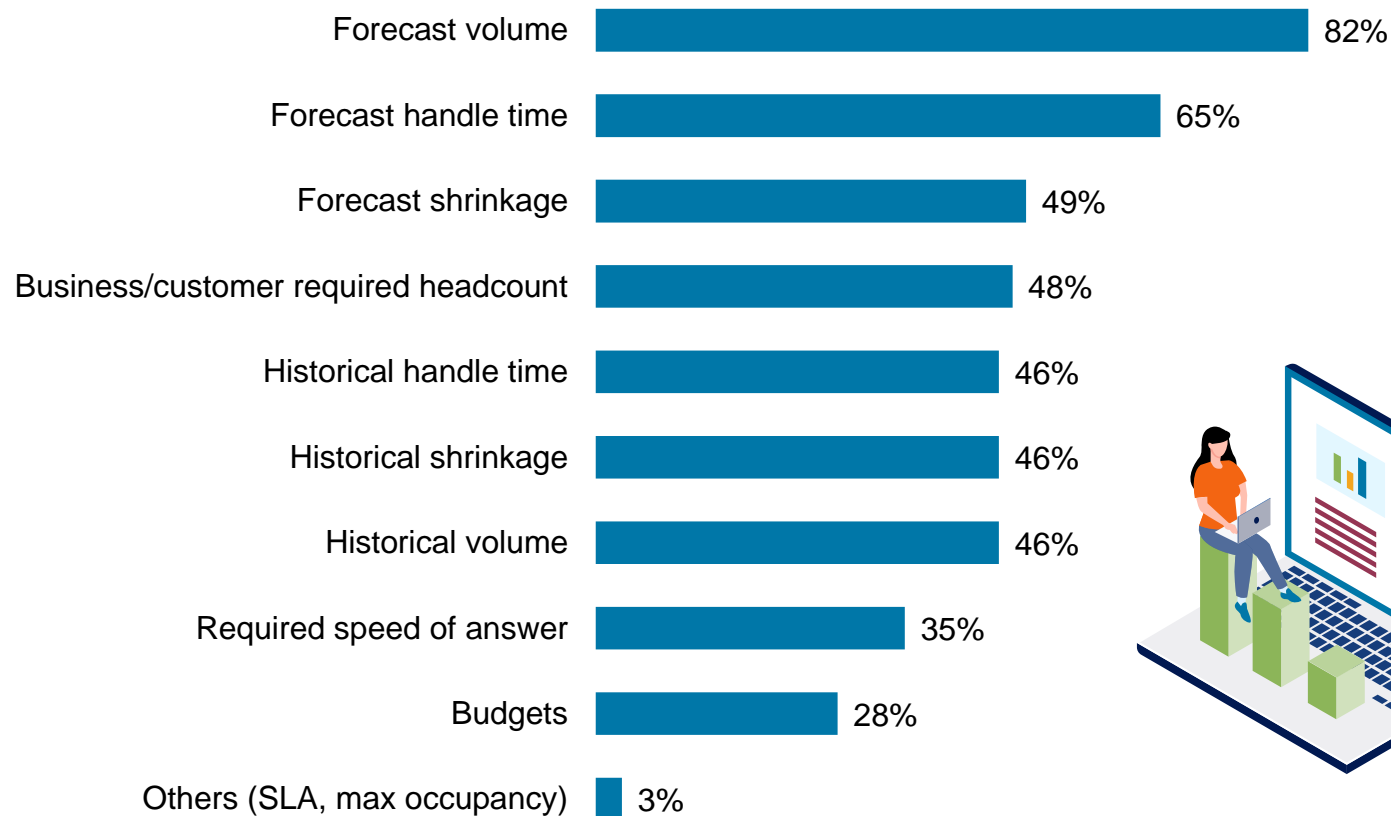
* Others: Six weeks, eight weeks, two months, etc.

STAFFING REQUIREMENTS

- Forecasting

- Interval Sizes

- Skill Acquirement

- Real-time Management

- Typical Spans and Layers

COMPONENTS OF FORECASTING STAFFING REQUIREMENTS

To determine staffing requirements for the schedule/roster, which of the following components do you include in your model? (Select all that apply.)

| Component	Percentage
Forecast volume	82%
Forecast handle time	65%
Forecast shrinkage	49%
Business/customer required headcount	48%
Historical handle time	46%
Historical shrinkage	46%
Historical volume	46%
Required speed of answer	35%
Budgets	28%
Others (SLA, max occupancy)	3%

COPC CX Standard for Contact Centers 7.0 requires a scheduling approach incorporating service level or cycle time targets and forecasts for volume, handle time and shrinkage.

Forecast volume and handle time are the most common components used to determine staffing requirements, with 62% of respondents indicating they include both.

Additionally, 58% of respondents reported that their models incorporate at least four of these components.

SCHEDULING APPROACHES ALLOWING STAFF PREFERENCE AND FLEXIBILITY

Does your scheduling process allow for staff preference-based scheduling?

No 27%

73% Yes
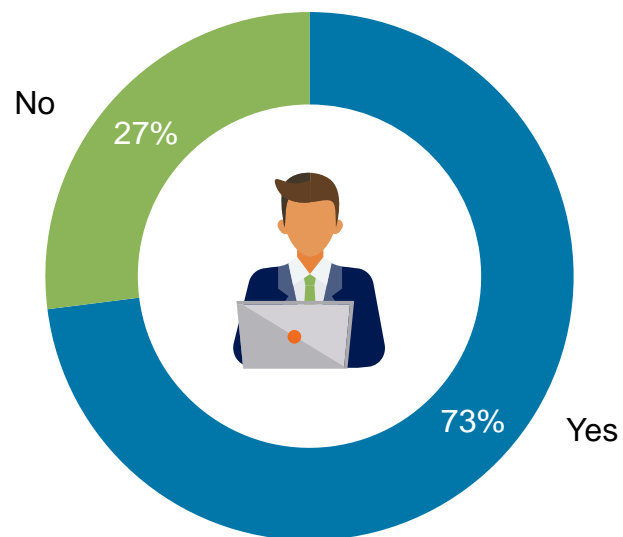
Three out of four respondents indicated that their organizations' scheduling processes take staff preferences into account.

Additionally, two out of three respondents cited fixed shifts as the common method used to provide flexibility in scheduling.

* Varied schedule lengths are 10 hours x 4 days, 12 hours x 3 days, 8 hours x 5 days etc.

Which of the following approaches do you use in your scheduling to support flexibility? (Select all that apply.)

Fixed shifts	Varied schedule lengths*	Split shifts	Others
66%	48%	36%	14%
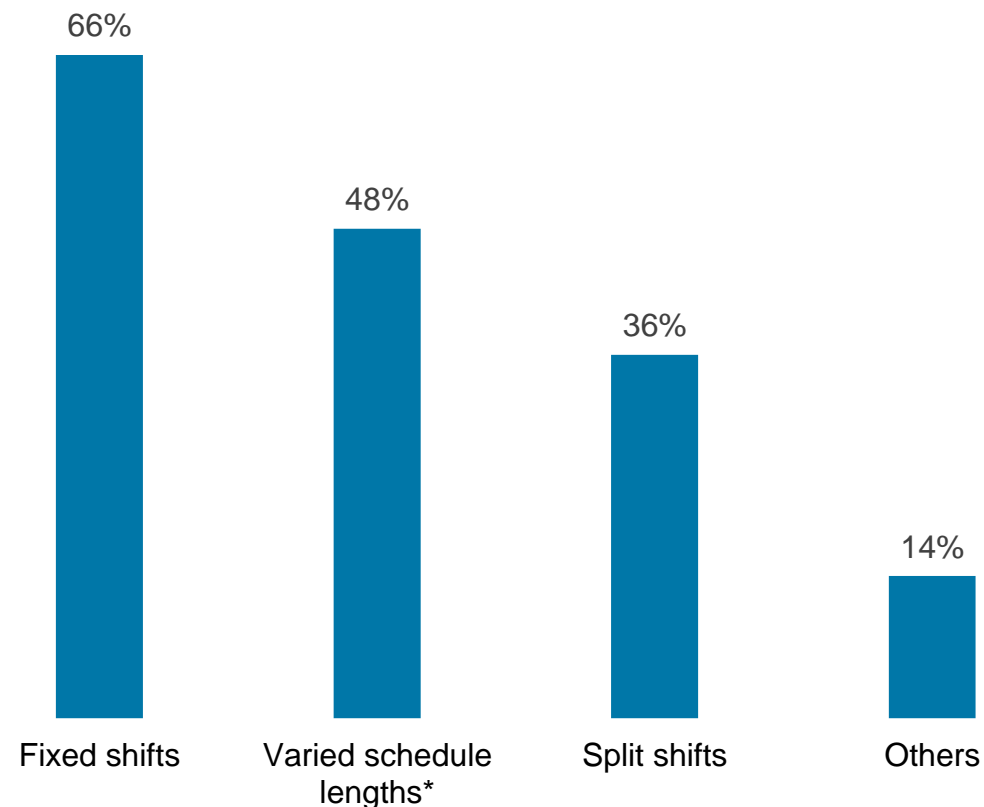
INTERVAL SIZES FOR STAFFING REQUIREMENTS

What interval-size do you use to calculate staffing requirements?

Real time transactions

Deferred/Other transactions
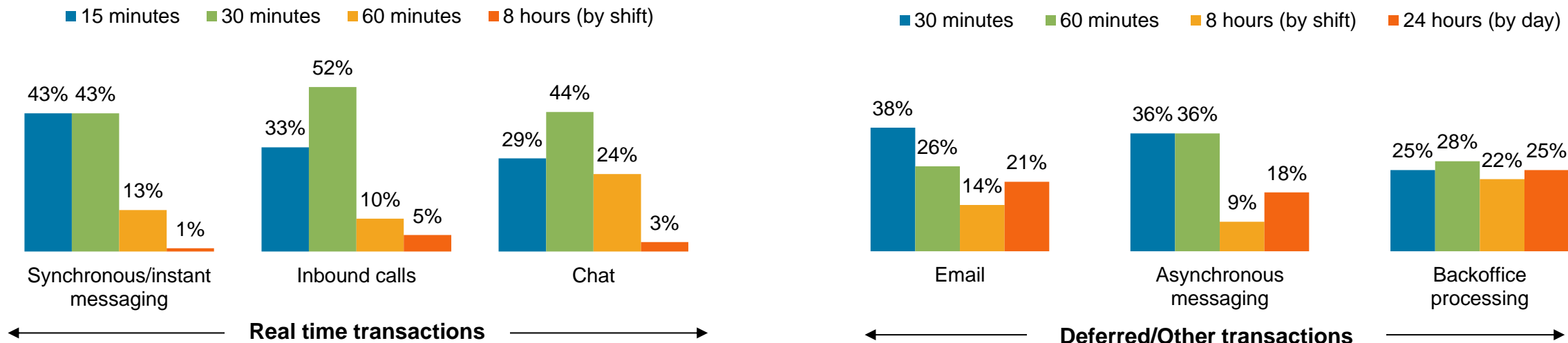
COPC CX Standard for Contact Centers 7.0 requires a customer care organization's scheduling approach based on the following intervals: i) real-time transactions − no more than 30-minute intervals, and ii) deferred transactions − appropriate intervals for the targeted cycle time.
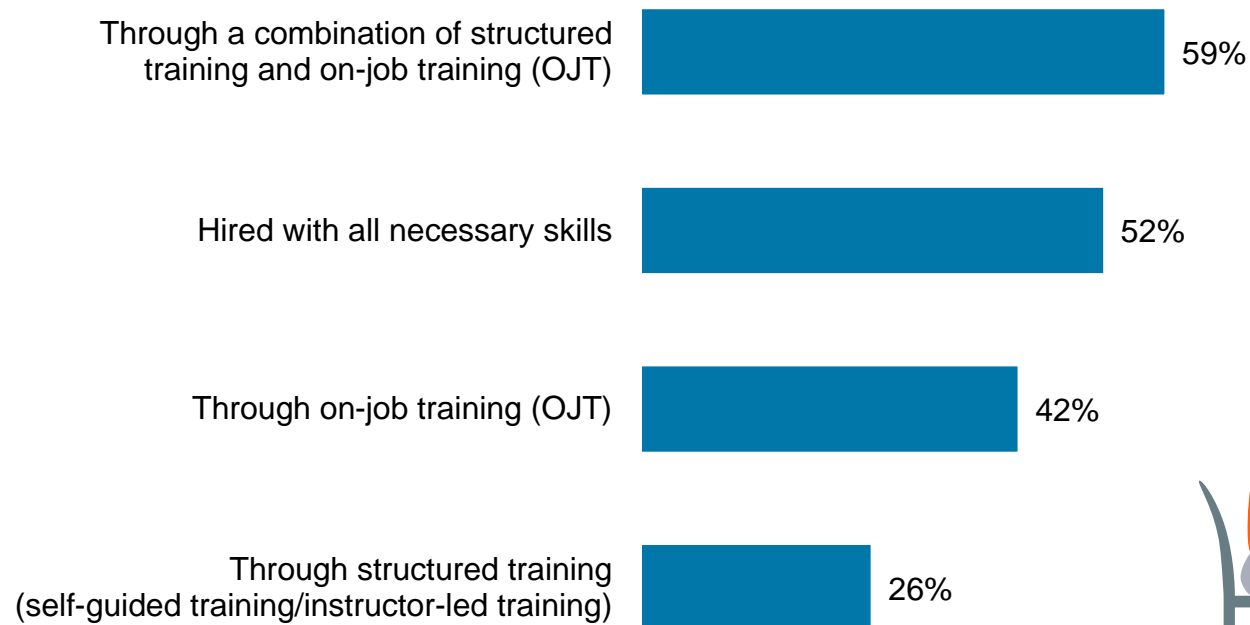
A majority of respondents, 85% or more, evaluate staffing needs for inbound calls and instant messaging based on intervals of up to 30 minutes. Similarly, 73% of organizations use this 30-minute timeframe for staffing calculations in chat support. However, a larger interval is typically considered for deferred transactions.

SKILLING THE WORKFORCE MANAGEMENT STAFF

How do your workforce management staff acquire skills? (Select all that apply.)

Through a combination of structured training and on-job training (OJT) — 59%

Hired with all necessary skills — 52%

Through on-job training (OJT) — 42%

Through structured training (self-guided training/instructor-led training) — 26%
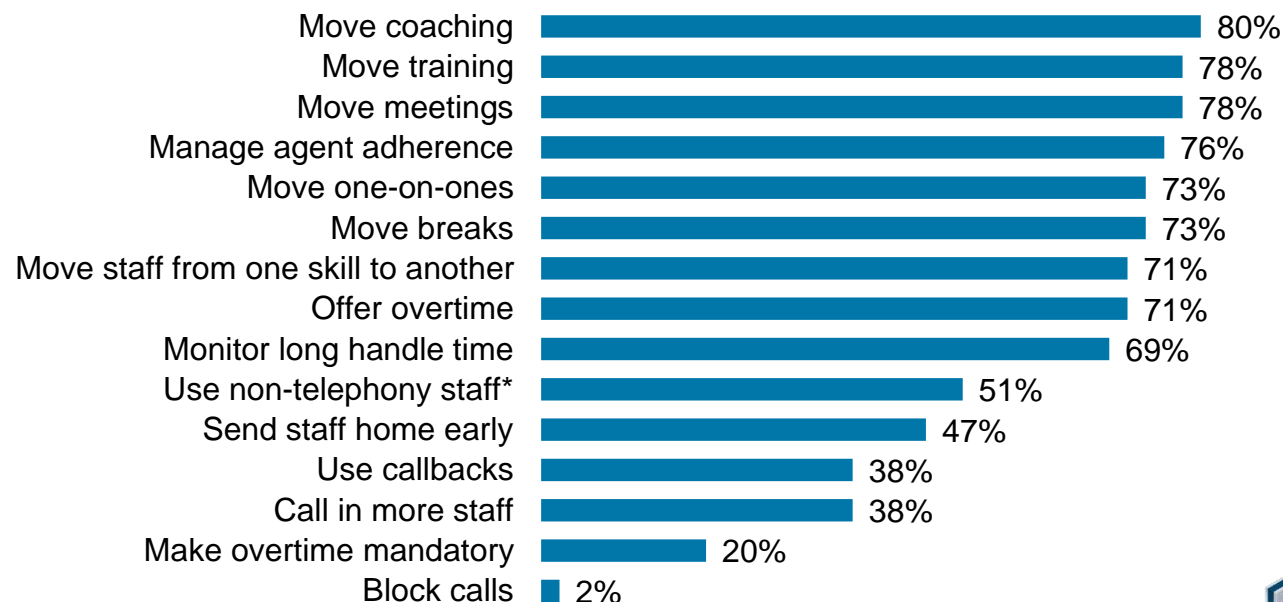
27% of the respondents state that their organizations hire WFM staff with all necessary skills and facilitate skilling through structured training and OJT.

REAL-TIME MANAGEMENT

Do you have a structured approach for real-time management?
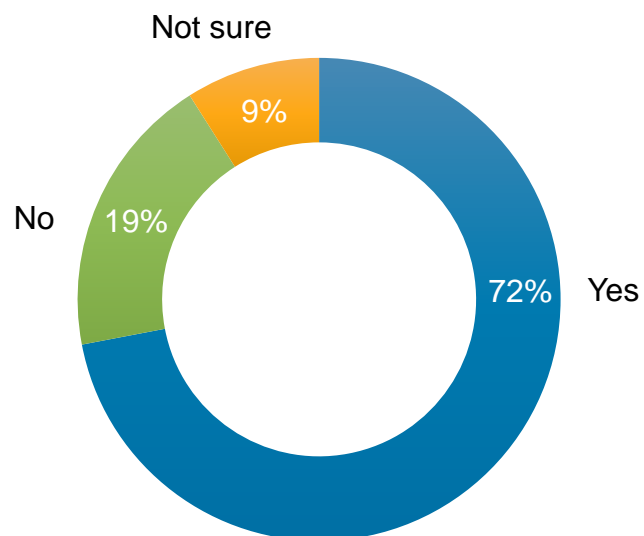
Which of the following actions are included in your real-time management approach? (Select all that apply.)

Action	%
Move coaching	80%
Move training	78%
Move meetings	78%
Manage agent adherence	76%
Move one-on-ones	73%
Move breaks	73%
Move staff from one skill to another	71%
Offer overtime	71%
Monitor long handle time	69%
Use non-telephony staff*	51%
Send staff home early	47%
Use callbacks	38%
Call in more staff	38%
Make overtime mandatory	20%
Block calls	2%

COPC CX Standard for Contact Centers 7.0 requires customer care organizations to use a structured approach for taking actions when actual performance significantly differs from the forecast or schedule (e.g., volumes or handle times).

72% of respondents indicated that their organizations employ a structured approach to real-time management.
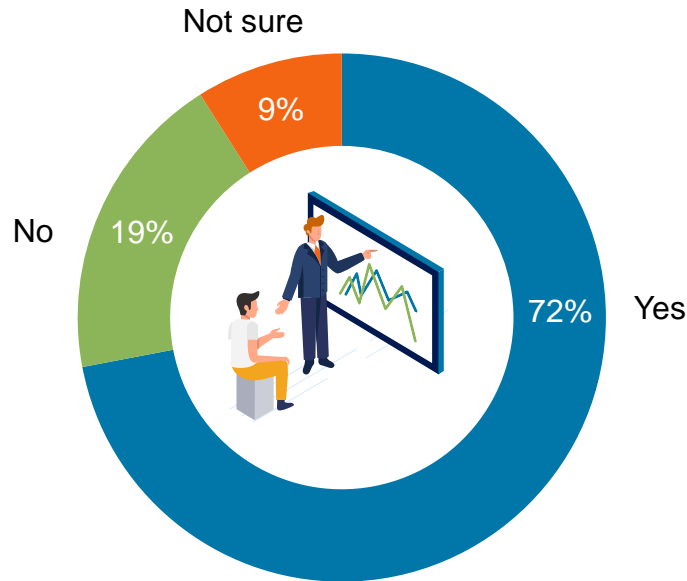
Furthermore, 80% reported that their organizations incorporate at least six of these actions into this real-time management strategy.

* E.g., team leaders, back-office staff, etc.

REAL-TIME MANAGEMENT

Do you have a structured approach for real-time management?

Not sure

9%

No

19%

72%

Yes

What is the scope of action of your real-time management approach?

44%

36%

16%

4%

The next hour

The upcoming part of day

The next couple of days of the week

Others

Move meetings
Move breaks
Move coaching
Manage agent adherence
Monitor long handle time

Move training
Move one-on-ones
Move coaching

At least 75% of respondents who say the scope usually relates to the next hour or upcoming part of the day report that these actions are taken for real-time management.
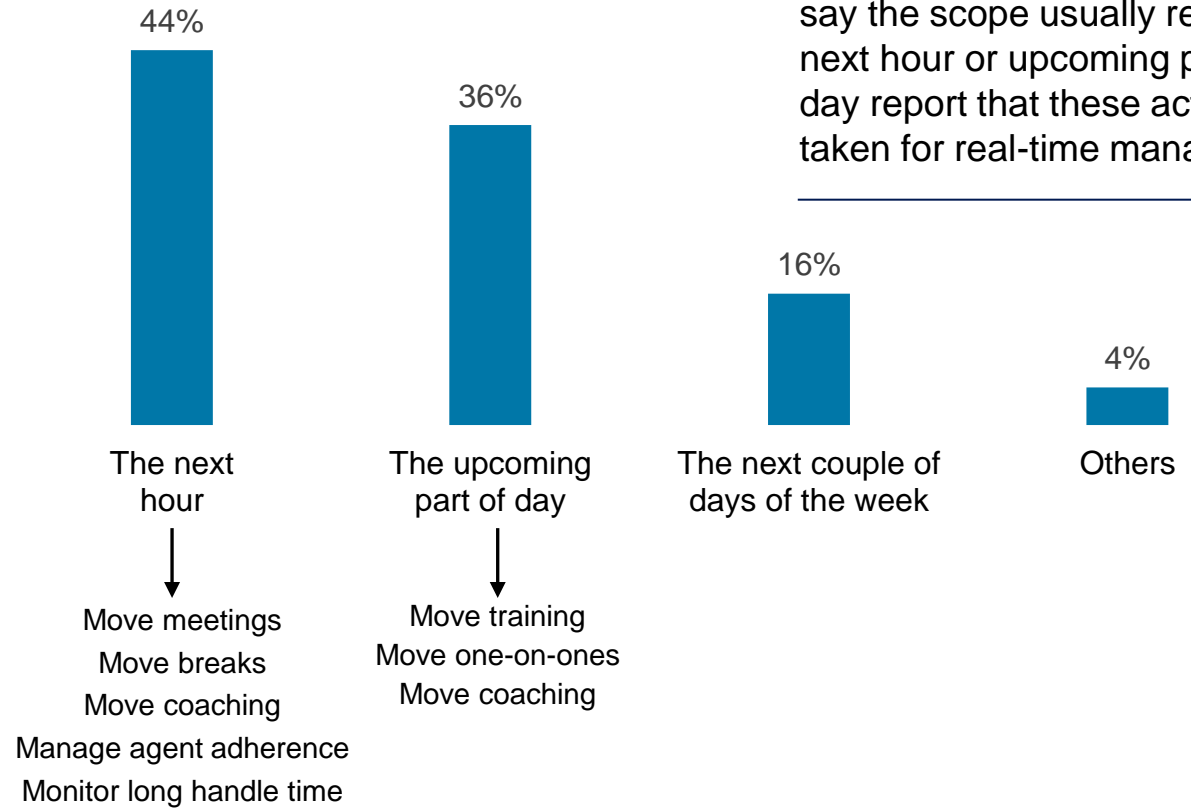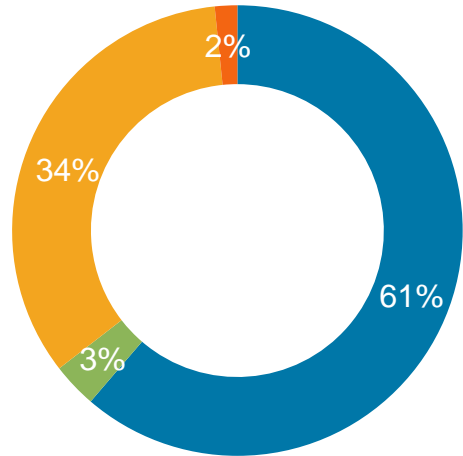
METRICS

- Service Level
- Average Handle Time (AHT)
- Adherence
- Frontline Occupancy
- Agent Absenteeism
- Agent Attrition
- Staffing Forecast Accuracy
- Scheduling Forecast Accuracy

SERVICE LEVEL

For which of the following channels does your organization measure service level/speed of answer or service rate?
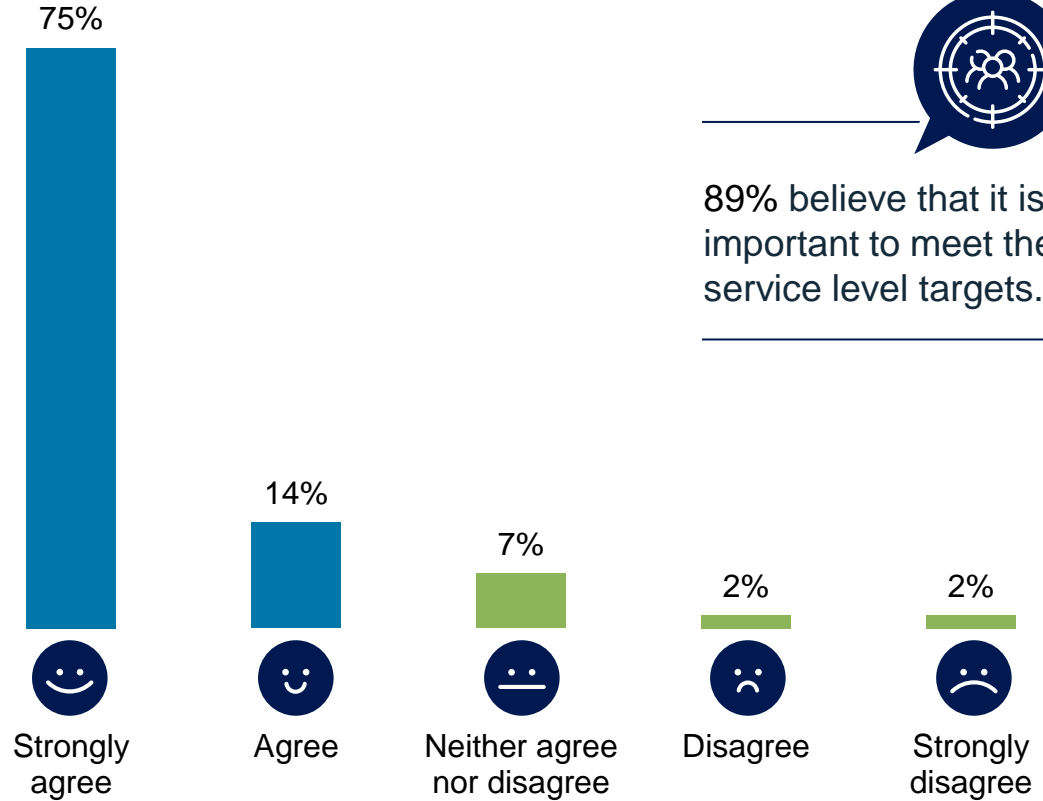
- 2%
- 34%
- 3%
- 61%

98% of the respondents measure service level.

- ■ Human-assisted channels
- ■ Self-service technologies
- ■ Both human-assisted channels and self-service technologies
- ■ None

How strongly do you agree that it is important for your organization to meet its service level targets?

- 75% — Strongly agree
- 14% — Agree
- 7% — Neither agree nor disagree
- 2% — Disagree
- 2% — Strongly disagree

89% believe that it is important to meet the service level targets.

AVERAGE HANDLE TIME (AHT)

For which of the following channels does your organization measure average handle time?
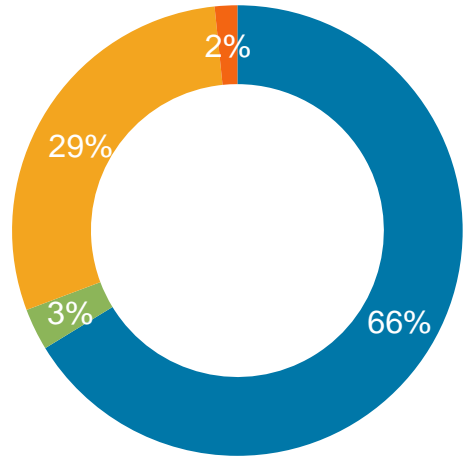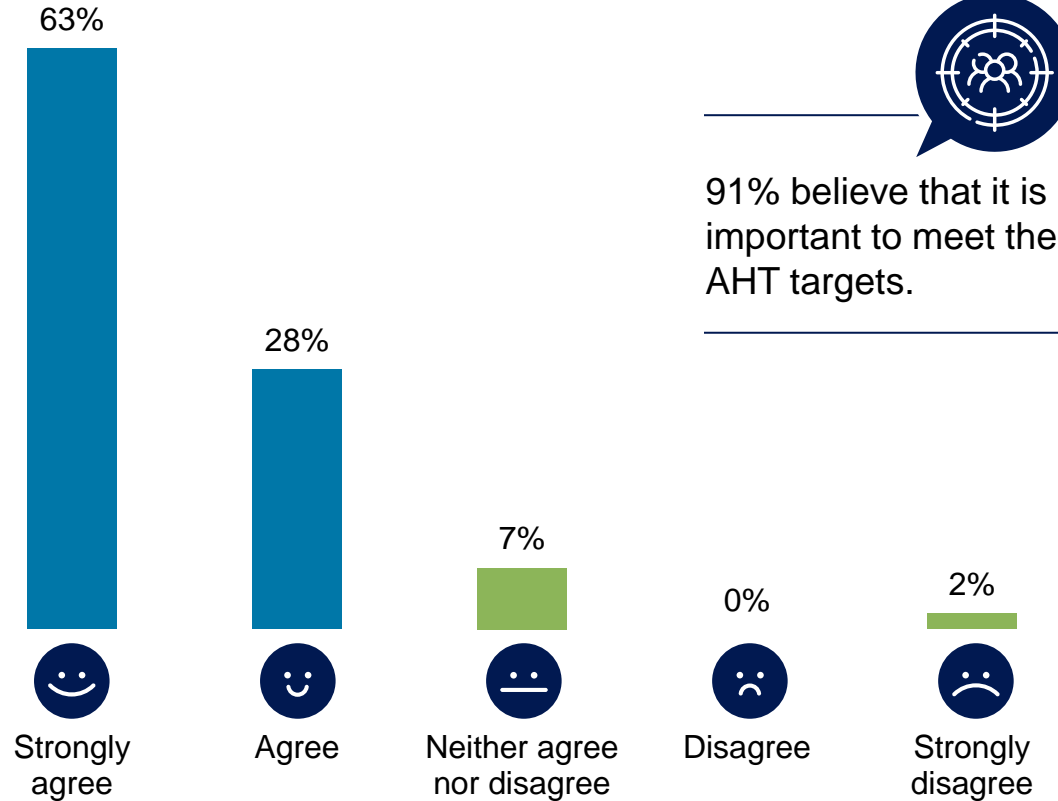
- 2%
- 29%
- 3%
- 66%

98% of the respondents state their organizations measure AHT.

- ■ Human-assisted channels
- ■ Self-service technologies
- ■ Both human-assisted channels and self-service technologies
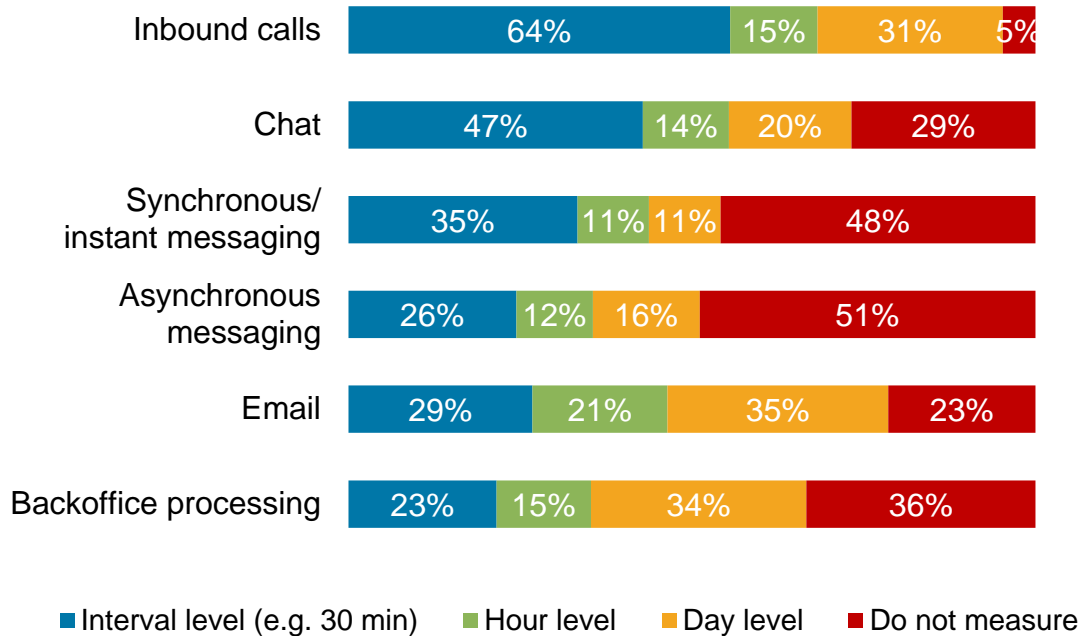- ■ None

How strongly do you agree that it is important for your organization to meet its average handle time targets?

63%
28%
7%
0%
2%

91% believe that it is important to meet the AHT targets.

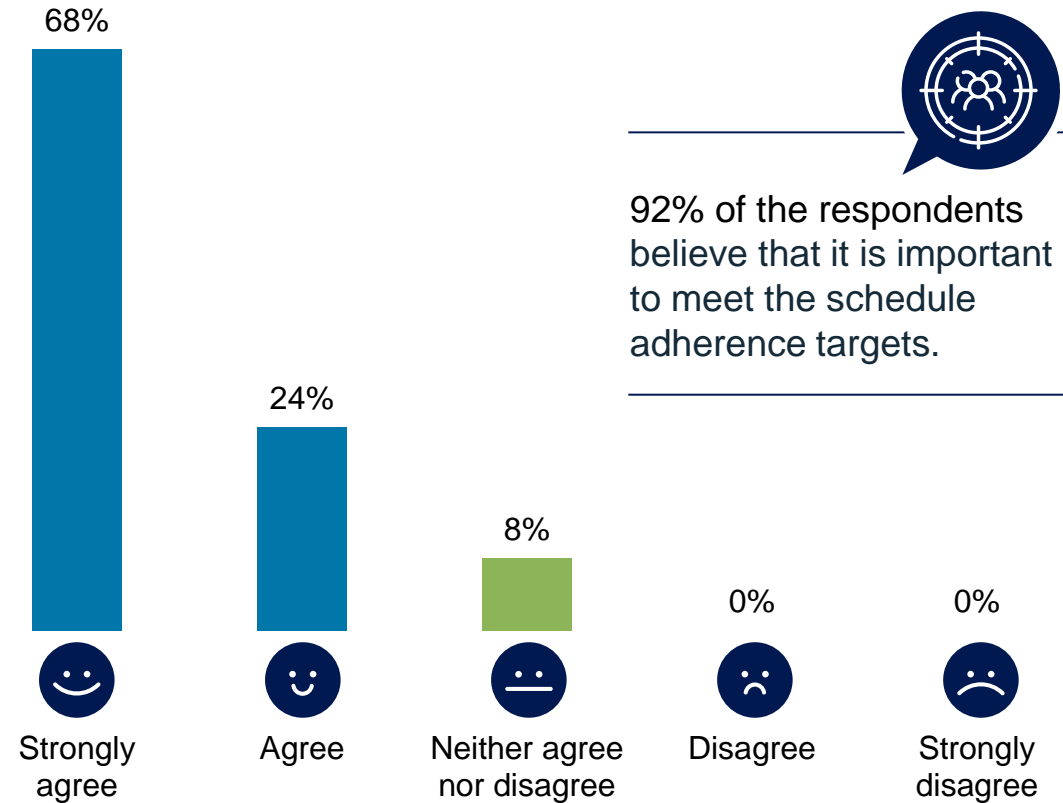Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree

ADHERENCE

In what manner does your organization measure frontline schedule adherence for each of the following? (Select all that apply.)

Category	Interval level (e.g. 30 min)	Hour level	Day level	Do not measure
Inbound calls	64%	15%	31%	5%
Chat	47%	14%	20%	29%
Synchronous/ instant messaging	35%	11%	11%	48%
Asynchronous messaging	26%	12%	16%	51%
Email	29%	21%	35%	23%
Backoffice processing	23%	15%	34%	36%

■ Interval level (e.g. 30 min) ■ Hour level ■ Day level ■ Do not measure
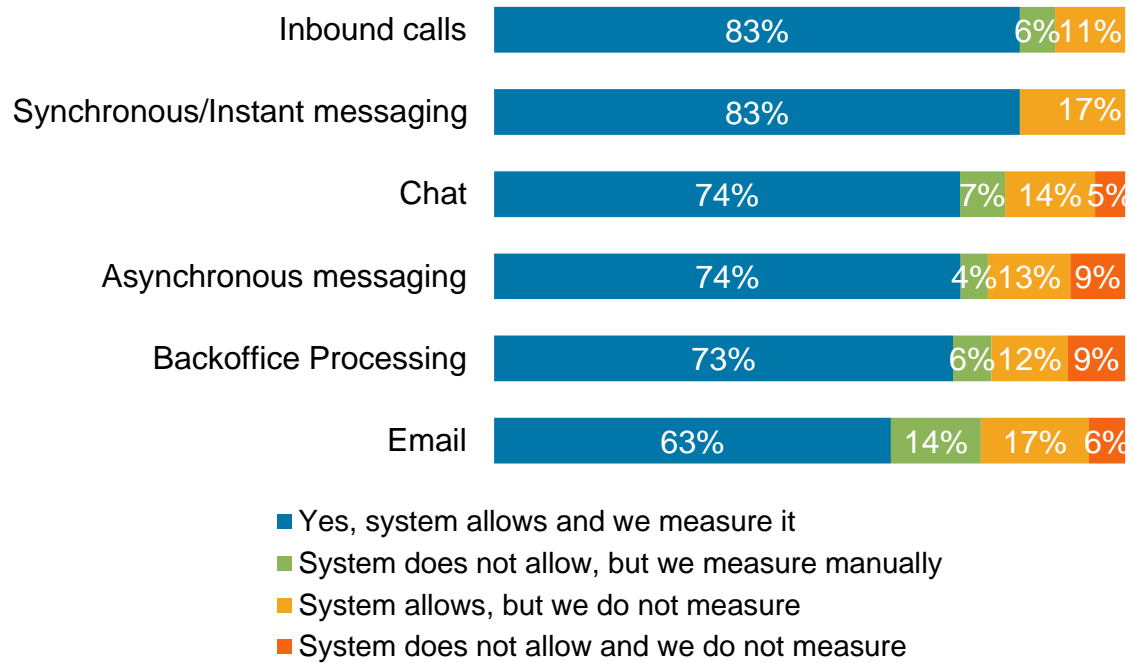
Typically, smaller intervals are used to measure schedule adherence for real-time interactions, such as inbound calls and chats, while larger intervals are more common for deferred interactions.

How strongly do you agree that it is important for your organization to meet its frontline adherence targets?

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
68%	24%	8%	0%	0%

92% of the respondents believe that it is important to meet the schedule adherence targets.
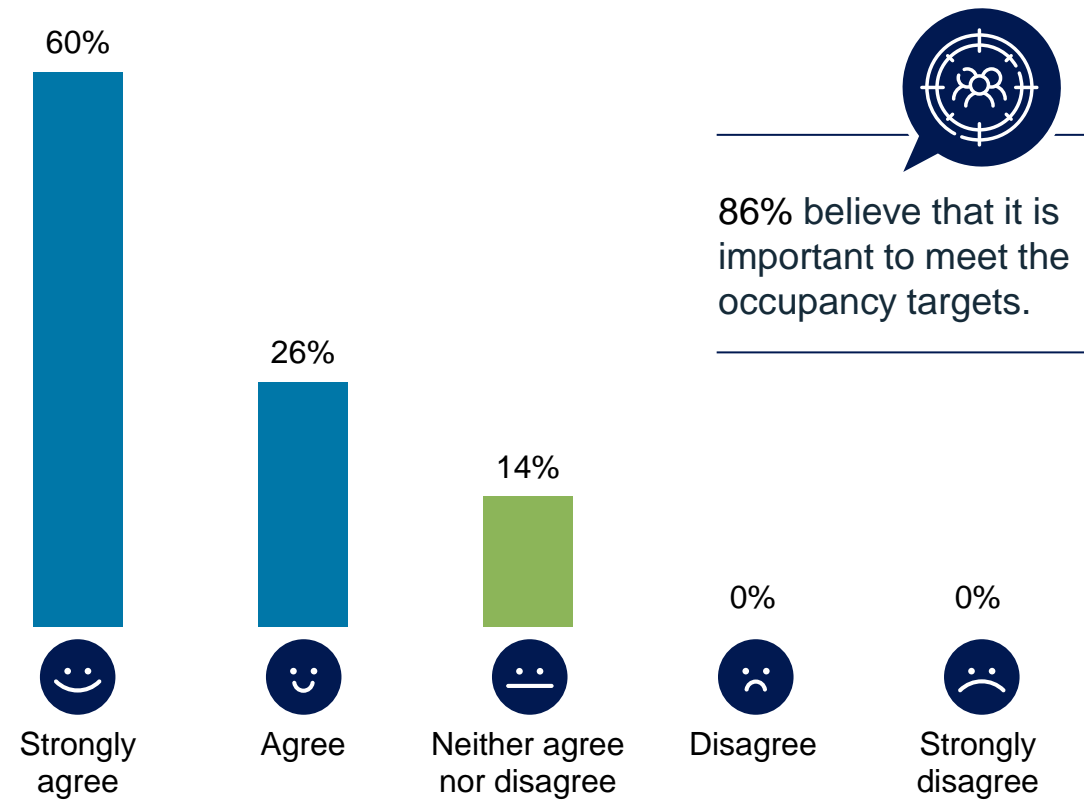
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FRONTLINE OCCUPANCY

Does your organization measure frontline occupancy (amount of time staff is productive compared to time they are logged in the system)?

Inbound calls	83%	6%	11%
Synchronous/Instant messaging	83%		17%
Chat	74%	7%	14% 5%
Asynchronous messaging	74%	4%	13% 9%
Backoffice Processing	73%	6%	12% 9%
Email	63%	14%	17% 6%

■ Yes, system allows and we measure it
■ System does not allow, but we measure manually
■ System allows, but we do not measure
■ System does not allow and we do not measure

When it comes to email, system-based measurements for frontline occupancy are typically lower and are balanced out by manual measurements.

How strongly do you agree that it is important for your organization to meet its frontline occupancy targets?

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
60%	26%	14%	0%	0%

86% believe that it is important to meet the occupancy targets.

AGENT ABSENTEEISM
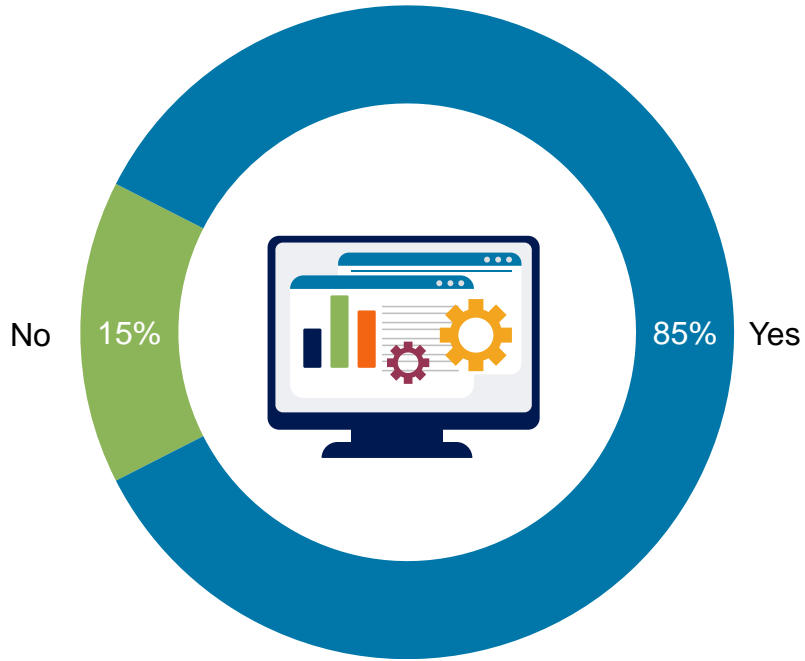
Does your organization measure agent absenteeism?

No 5%

95% Yes
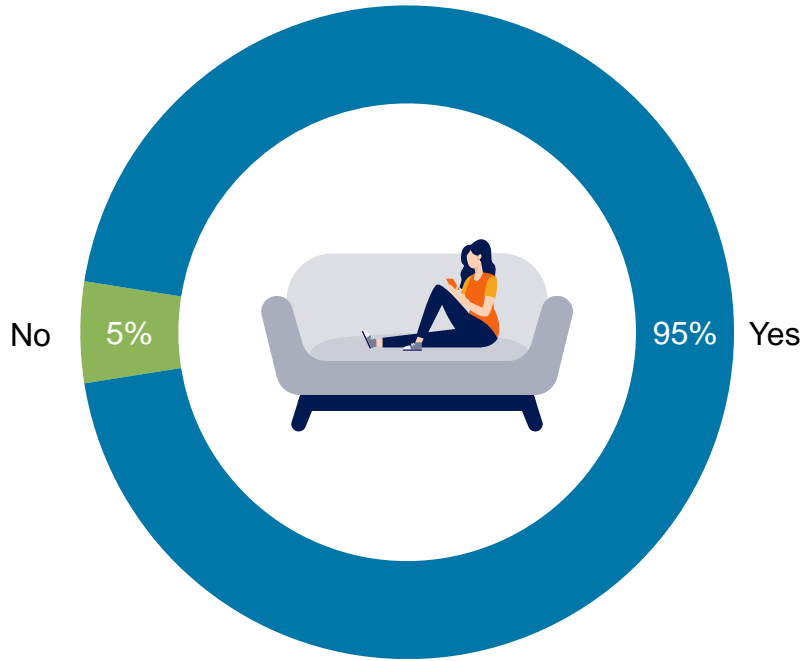
How strongly do you agree that it is important for your organization to meet its agent absenteeism targets?

79%

20%

1%

0%

0%

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree
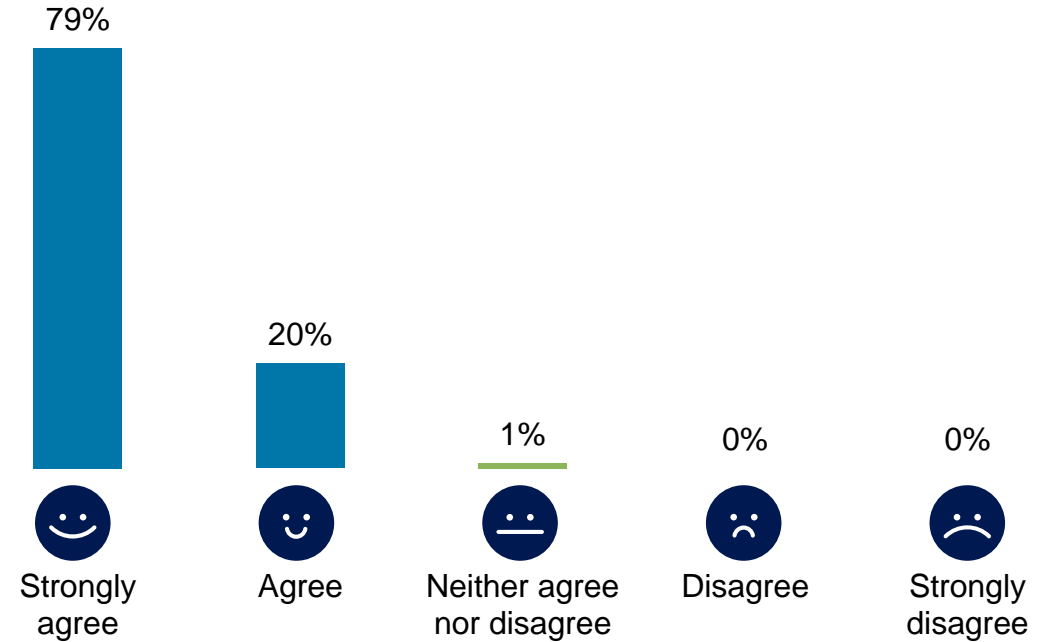
95% of the respondents state their organizations measure agent absenteeism, with almost everyone (99%) saying that it is important to meet the set targets.

copc

AGENT ATTRITION

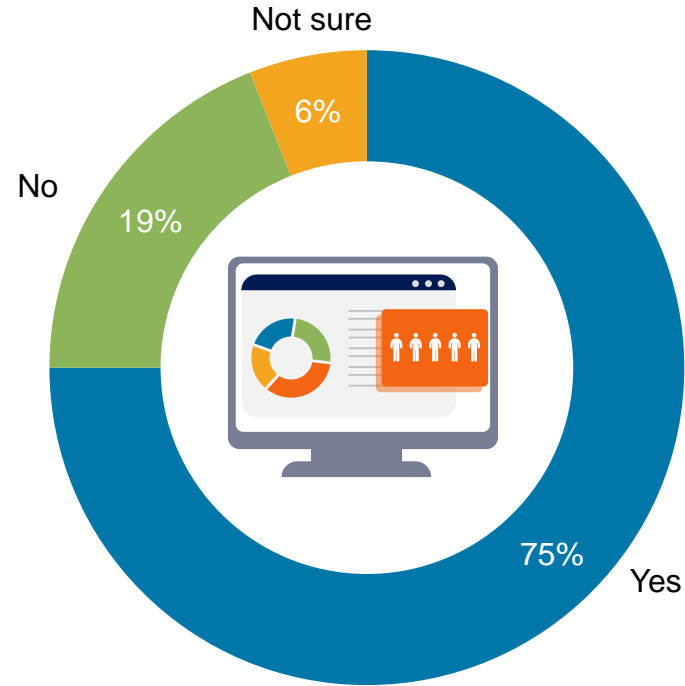**Does your organization measure agent attrition?**

No — 15%

85% Yes

How strongly do you agree that it is important for your organization to meet its agent attrition targets?

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
74%	22%	4%	0%	0%
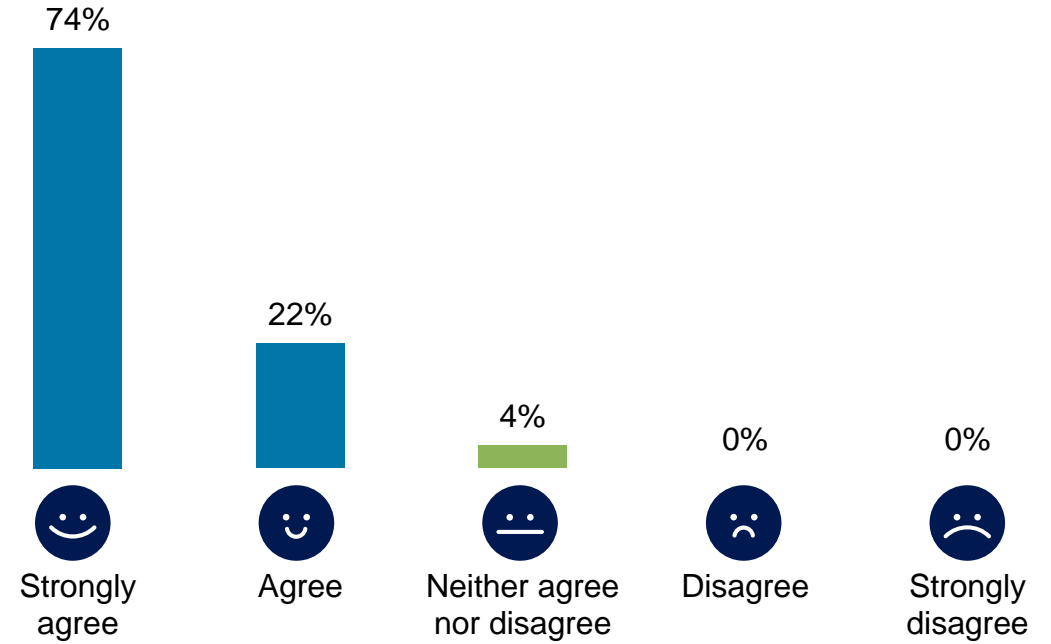
85% of the respondents state their organizations measure agent attrition. 96% of these respondents believe that it is important to meet the set targets.

COPC®

STAFFING FORECAST ACCURACY

Does your organization measure staffing forecast accuracy?

Not sure — 6%

No — 19%

Yes — 75%
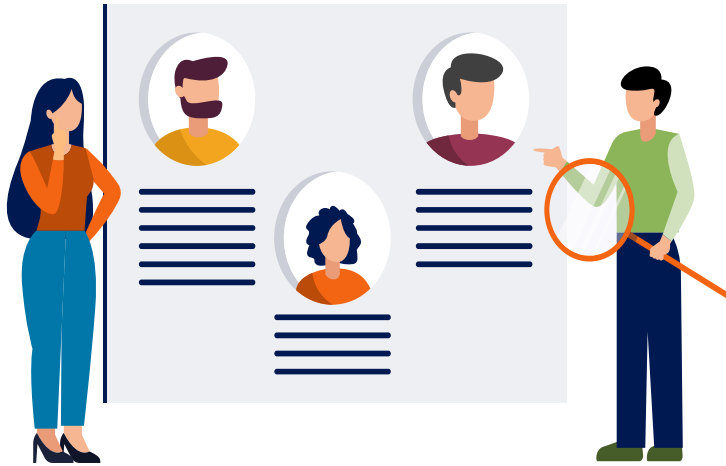
COPC CX Standards, 7.0 requires weekly forecasting to account for operational lag time for hiring and training.

75% of the executives say they measure accuracy for staffing forecasts.

SCHEDULING FORECAST ACCURACY

Does your organization measure scheduling forecast accuracy?

| Yes 77% | Not sure 8% | No 15% |

▼

Days of the week are ranked based on the percentage of contact volume received.
(Rank #1 indicates the day with the highest contact volume, and #7 is for the day with the lowest contact volume.)

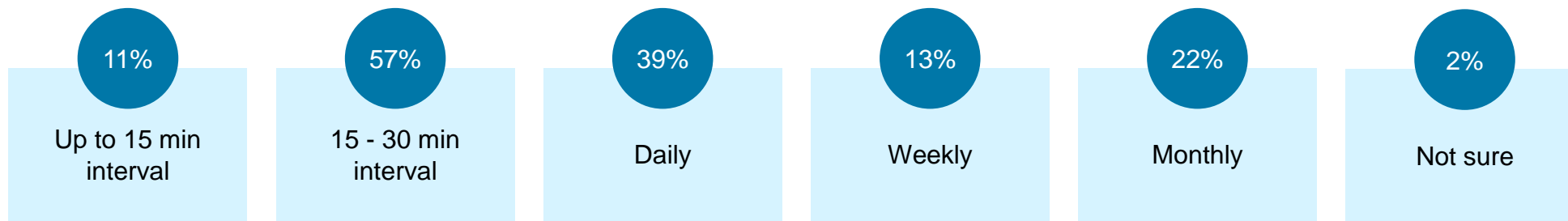| #1	#2	#3	#4	#5	#6	#7
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Typically, Mondays are the busiest days since customer care organizations are often closed on the weekends. Organizations should consider using multi-skilled agents to help support increased volumes on more active days and switch back to other duties on other days.

SCHEDULING FORECAST ACCURACY

Does your organization measure scheduling forecast accuracy?

| Yes 77% | Not sure 8% | No 15% |

▼

At which level do you measure your scheduling forecast accuracy?
(Select all that apply)

| 11% | 57% | 39% | 13% | 22% | 2% |
| Up to 15 min interval | 15 - 30 min interval | Daily | Weekly | Monthly | Not sure |

Intervals of 15 to 30 minutes are the most frequently used time frame for assessing the accuracy of scheduling forecasts.

PREDICTABILITY AND SEASONALITY OF VOLUMES

How strongly do you agree with this statement, "Our contact volumes have predictable arrival patterns"?

Strongly agree	25%
Agree	53%
Neither agree nor disagree	12%
Disagree	10%
Strongly disagree	0%
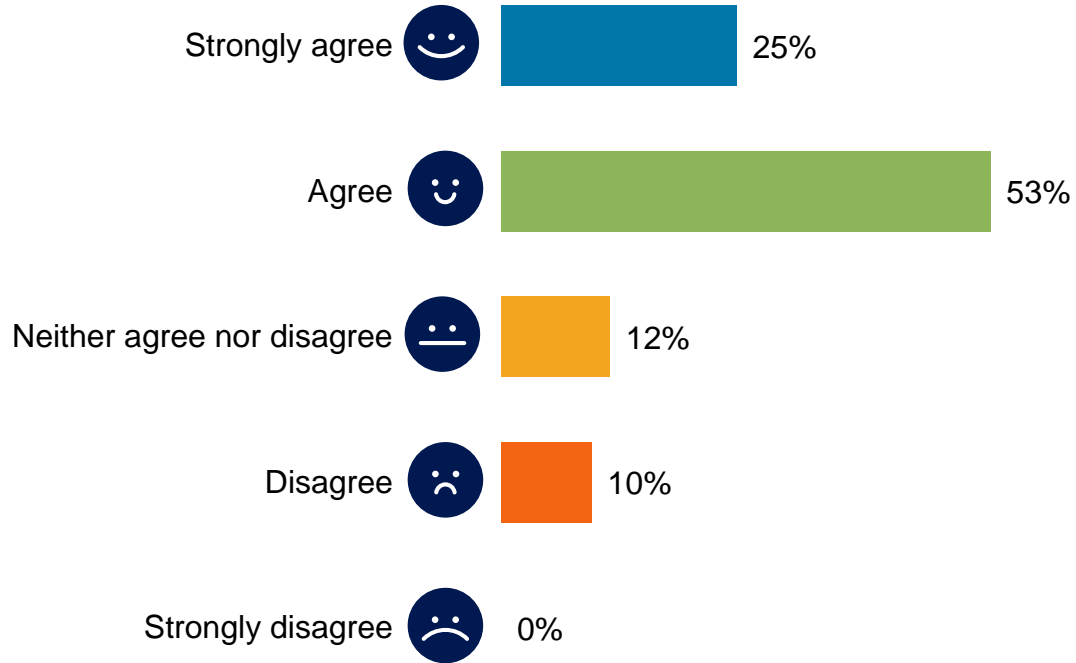
37% of respondents with predictable arrival patterns also said they create long-term forecasts for up to 12 months or more.

How strongly do you agree with this statement, "Our contact volumes are impacted by seasonality"?

Strongly agree	51%
Agree	39%
Neither agree nor disagree	10%
Disagree	0%
Strongly disagree	0%
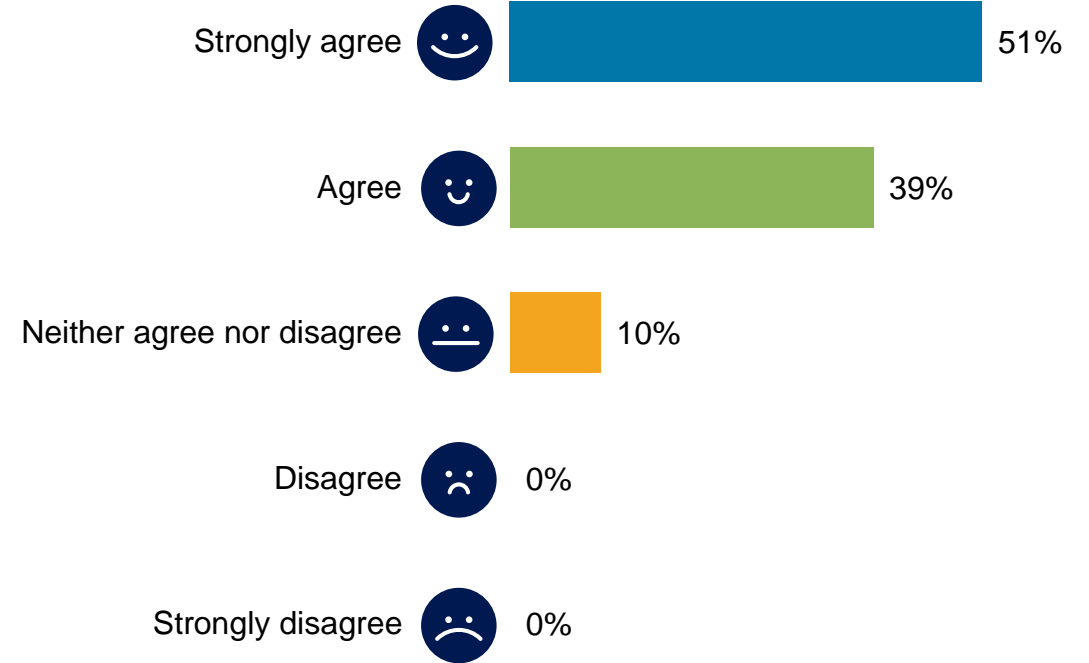
40% of respondents with fluctuating seasonal volumes also said they create long-term forecasts for up to 12 months or more.

CONCLUSION

CONCLUSION

Workforce management in contact centers has become both more complex and more essential in the post-pandemic world.

Focusing on accurate forecasting, optimal staffing, real-time management, and leveraging advanced technology allows contact centers to achieve consistent performance while balancing costs effectively.

By adopting these strategies, contact centers can enhance their service delivery while fostering a more engaged and productive workforce.

01

Determining the optimal staffing levels is crucial for balancing service quality and operational costs. Our research reveals that successful contact centers adopt flexible staffing models to accommodate fluctuating demand. Some good practices can be:

- Use part-time workers, split shifts and on-call staff to manage peak periods.
- Equip staff with multiple skills to handle different types of contacts.
- Account for factors such as breaks, training, and absenteeism to ensure adequate coverage.

02

Effective real-time management involves monitoring and adjusting staffing levels throughout the day to maintain service levels. Our survey highlights the importance of real-time data and ways of achieving this. Some helpful practices can include:

- Monitor key metrics such as wait times, service levels, and agent availability.
- Provide supervisors with tools to quickly communicate with agents and make adjustments.
- Continuously update forecasts and staffing plans based on real-time data.

03

The use of technology and metrics is fundamental to optimizing workforce management. Leading contact centers would use advanced WFM software to automate processes and provide actionable insights. Some valuable practices can include:
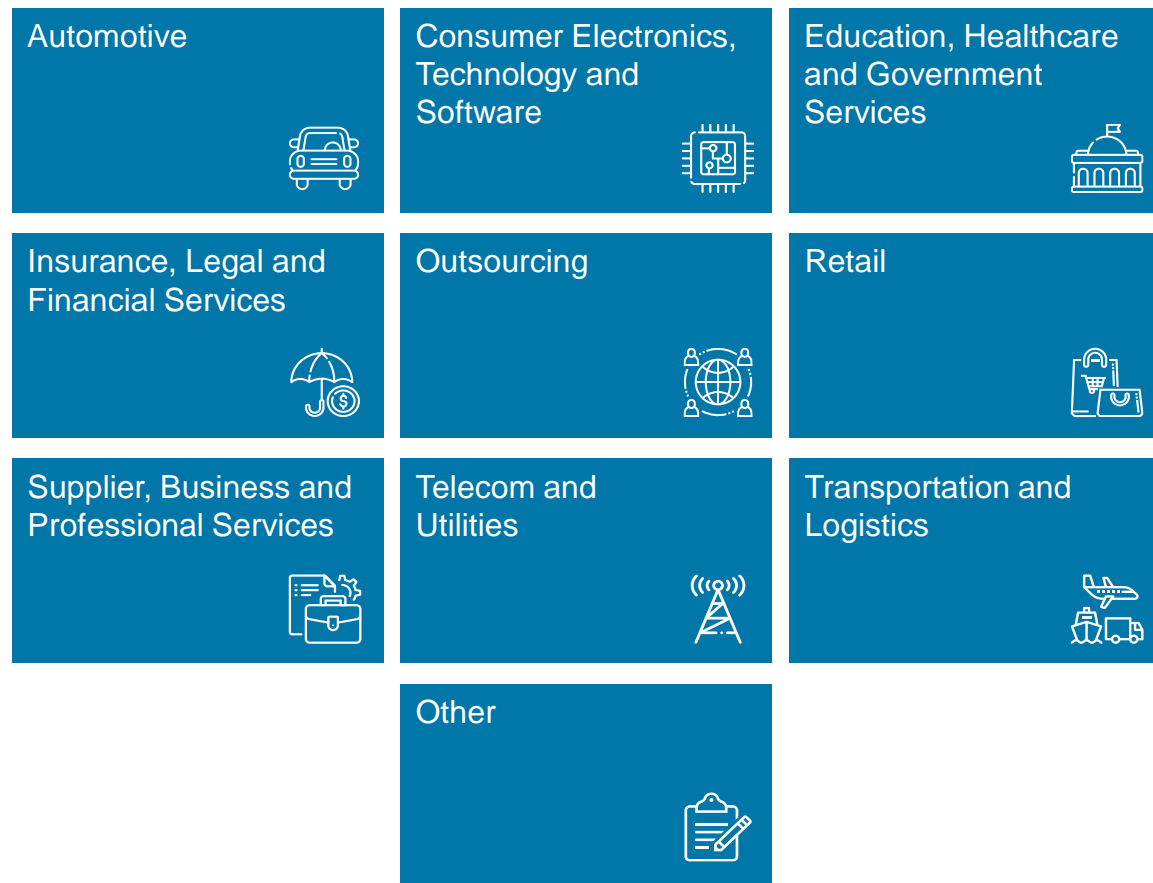
- Use tools that offer features such as scheduling, forecasting, and real-time management.
- Monitor metrics such as occupancy rates, service level, and average handle time.
- Use data analytics to identify trends, uncover inefficiencies, and drive continuous improvement.
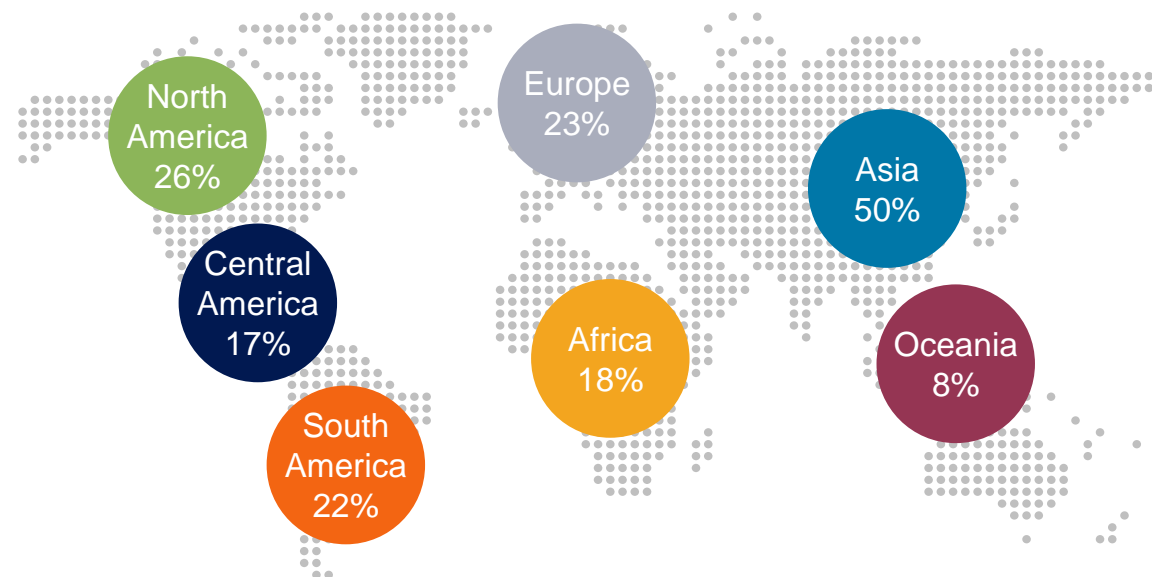
RESPONDENT PROFILE

RESPONDENT PROFILE – CORPORATE

Industries represented include:

Automotive	Consumer Electronics, Technology and Software	Education, Healthcare and Government Services
Insurance, Legal and Financial Services	Outsourcing	Retail
Supplier, Business and Professional Services	Telecom and Utilities	Transportation and Logistics
Other		

Where are your contact centers located?

North America 26%

Europe 23%

Asia 50%

Central America 17%

Africa 18%

Oceania 8%

South America 22%

METHODOLOGY – CORPORATE

01

Structured quantitative questionnaires were used to gather input from corporate respondents.

02

COPC Inc. conducted surveys with executives who are actively involved in customer experience roles across various geographical locations.

03

The surveys were conducted between January 16 and May 31, 2023. A total of over 1,000 executives actively participated in these surveys.

APPENDIX

METRICS FOR MEASURING PERFORMANCE OF WFM

The goal of the COPC CX Standard is to help customer care organizations improve the customer experience and consistently achieve high levels of performance while balancing costs.

01 Service Level
The percentage of transactions answered within a targeted amount of time.

02 Average Handle Time (AHT)
The average amount of time a CSS spends processing a transaction. This includes time spent communicating with customers, hold time and completing the transaction.

03 Adherence
There are multiple definitions of schedule adherence. The numerator and denominator will vary depending on the definition. For example, comparing actual and scheduled work by the time of day and the type of work (*handling transactions, attending meetings, coaching, on break, etc*.).

04 Occupancy
The time a CSS is engaged in productive work is a percentage of the time they are available to do productive work.

05 Agent Absenteeism
The number of hours lost through unplanned short-term absenteeism as a percentage of scheduled hours.

06 Agent Attrition
The number of people who left and were backfilled as a percentage of total heads.

07 Scheduling Forecast Accuracy
The variance between the forecast and actual required staffing levels. It is calculated as the percentage of intervals within +x% and –y% of the forecast staffing requirements.

08 Staffing Forecast Accuracy
The average absolute weekly or daily percentage variance between the forecast and actual required staffing levels.

WHO WE ARE

WHO WE ARE

COPC Inc. provides consulting, training, certification, benchmarking and research for operations supporting the customer experience. The company created the COPC Standards, a collection of performance management systems for customer experience operations, customer experience management, vendor management and procurement.

Founded in 1996, COPC Inc. began by helping call centers improve their performance. Today, the company is an innovative global leader that empowers organizations to optimize operations to deliver a superior service journey. COPC Inc. headquarters are in Winter Park, FL, U.S., with operations in Europe, the Middle East, Africa, Asia Pacific, Latin America, India and Japan.

To learn more about COPC Inc., visit www.copc.com.