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Workforce management

The force behind productive employees and happy customers

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Introduction

As your business grows, so does your workforce. Soon, you face a pressing need to plan and forecast your staffing and budgeting needs. These become critical requirements, and you need to invest time in planning for the future to navigate daily hurdles and keep growing.

Managing employees' shifts, work hours, rotation during peak-hours, maintaining parity becomes challenging due to limited visibility. Something that was effortlessly done in the past with just a spreadsheet or casual monitoring would now require thorough analysis and in-depth understanding of how every process is taken care by your employees.

You need real-time monitoring to know when your employees are available, which team members are on planned or sudden leaves, their work and overtime hours, who has swapped shifts, and whether their work hours and pay scale comply with labor laws.

In the service industry, staff allocation is especially important because these metrics can directly impact customer support quality and customer satisfaction. Imagine a critical query remains unaddressed because not enough agents were assigned to a particular shift. The issue is escalated to an agent who acknowledges with a reply but is not the right person to resolve the query, so the ticket is routed to another team. Meanwhile, the customer is waiting for a response without any insight into the actual cause of the delay. Being understaffed or overstaffed at the wrong time can cost a business dearly.

> **Neglecting workforce planning can have consequences such as talent shortage, over hiring, increased recruitment costs, and operational disruptions.**

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Why Workforce Management Matters

Consistent service

Smooth operations

Cost effective

Workforce management is critical because it helps businesses operate efficiently, control labor costs, and deliver consistent service. It gives real-time data on actual demand. This can help businesses avoid overstaffing, that saves resources, and understaffing which is the primary cause of employee burnout and also greatly impacts the customer satisfaction rate (CSAT).

As operations scale the leadership can find it difficult to track attendance and performance without efficient WFM tools. They lack clear visibility and access to employee activity that hinder quick, effective decision-making.

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Take a look at this scenario.

A micro mobility tech company with a presence in four countries receives thousands of queries from its customers about prices, route details, request for new routes, tour guides etc. All these queries are sent to their support email address, which is managed in their native application. Once the support tickets are resolved, the customers are sent a feedback form to rate their experience and also suggestions to improve. The feedback details are stored in spreadsheets. These arrangements provide a workable solution to manage the daily support requests without many escalations.

However, the leadership lacks visibility from the operational perspective that hinders data-driven decision-making. For example, capturing agent activities and ticket-level granular measurement would give them visibility on:

- Time taken to resolve each ticket depending on their criticality

- Quality of agent replies

- Frequency of ticket reassignments and SLA violations

- Time spent on tickets and average resolution time

- Optimal time slot of each agent, their online and offline status

- Ticket routing strategy

- Team dynamics and individual performance

These real-time insights are critical: They provide information needed to reduce operational costs in a planned way that improves efficiency and aligns the team's resources with the company's needs.

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Address common business challenges with workforce management tools

Workforce management is a set of processes or methods that make it easier for businesses to manage their employees and resources, optimize productivity, and follow organization laws and regulations. There are various WFM tools available on the market that can be elected based on what a team or organization wants to achieve.

5 insights an efficient WFM tool should provide a business:

01 | Optimal utilization and distribution of resources

02 | Time and attendance tracking

03 | Monitoring process efficiency and productivity

04 | Improved productivity with AI and smart tools

05 | Employee satisfaction and user experience

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Optimal utilization and distribution of resources

Predicting workforce needs allows businesses to allocate the right number of employees for certain tasks and plan their budget distribution for support activities based on customer interest, emerging trends, and evolving market needs.

Ticket trend analysis

Quantitative assessment can be done by analyzing the historical and seasonal data. The number of incoming tickets vs. outgoing responses for a particular time period will indicate how the team is handling the volume of traffic and any room for improvement in response time. This data, coupled with SLA violations, provides a holistic view of the number of times the first response time or the resolution time are missed.

A **ticket trend analysis** shows the last 30 days of the data by day and hour. It also indicates the anomaly in trend, i.e., a sudden surge or dip in incoming and outgoing responses. If there is a sudden drop in responsiveness for consecutive days between 3am to 1pm, it can indicate a need for more agents working during that shift or an opportunity to analyze why they are receiving more customer queries during that shift.
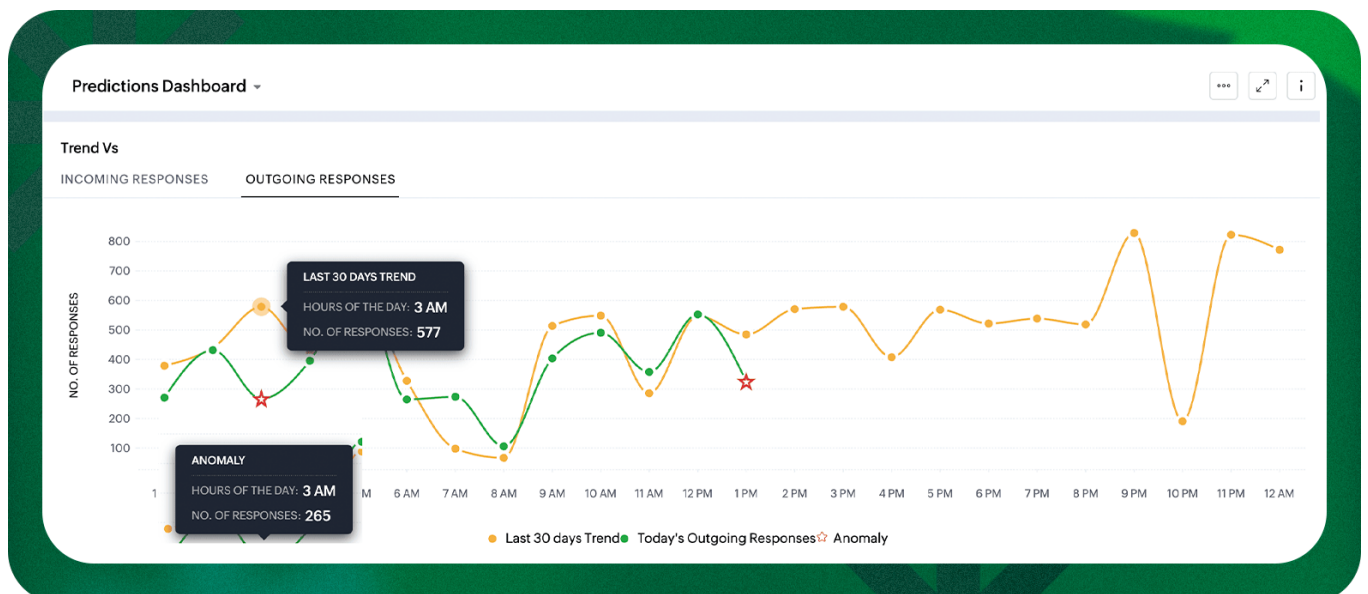
Leadership can take proactive measure to move more people to the 3am to 1pm shift, observe the effect on response time for a few weeks, and then make further adjustments as needed. Likewise, a surge in tickets after a product launch or downtime can be managed more efficiently by reallocating your workforce to handle those issues. The results from these changes can be used to manager similar events in future.
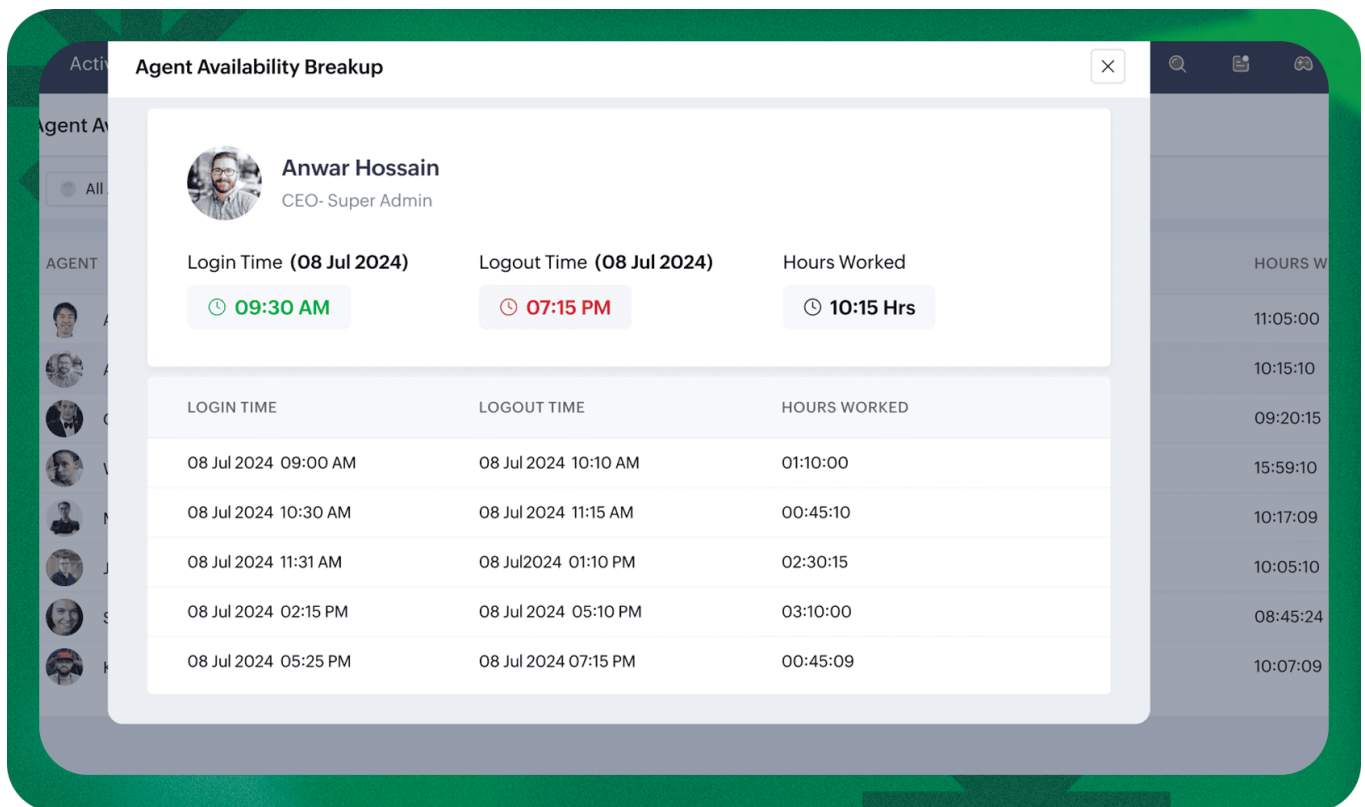
Trends can also indicate if the current workforce will be enough to handle the upcoming surge in order to avoid overhiring.

Trend analysis of customer sentiment

After downtime, if there is a surge in negative sentiment it can indicate poor customer engagement. Managers can check the ticket handling statistics mainly ticket closing time and first contact resolution (FCR) using the **agent performance report** to identify the problem. By fixing the response time and observing effects on the **sentiment trend,** they can anticipate similar situations in the future and prepare proactively. Based on the findings, the team can also consider whether to modify the SLA to ensure compliance and improve customer satisfaction.

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Time and attendance tracking

Monitoring **login and logout time,** session time, idle time, days off, and relevant productivity metrics is crucial for both hourly and salaried individuals. These performance metrics allow managers to evaluate their employees according to their performance and work hours and ensure compliance with the labor laws and regulations. The data also helps ensure accuracy when calculating payroll based on the number of hours an employee actually worked.


Leads can define the **idle timeout** to maintain consistency within the shifts and get accurate data. In the service industry, it is essential to track the time spent on customer requests to calculate the invoiced or billable hours.

Time tracking provides a breakdown of the time an agent spends on each activity such as call, performing a task, or sending an email. The tracker can be operated manually or automatically with a defined idle timeout that pauses the timer after a certain period of inactivity. Hourly charges are calculated based on the billing preferences that show the billable hours, invoice hours, no-billable hours, and other relevant data—along with the total amount.

Businesses that want to further customize the attendance tracking can use the **Agent attendance tracker extension** that allows defining the break hours like meal break, team bonding session etc. It also provides the option to add custom activities that employees are engaged with as part of their daily activities like outdoor filming, recording podcasts, or attending sales meetings. Evaluating an individual's productivity based on the attendance and time spent on each activity gives team leaders and managers a more holistic view.
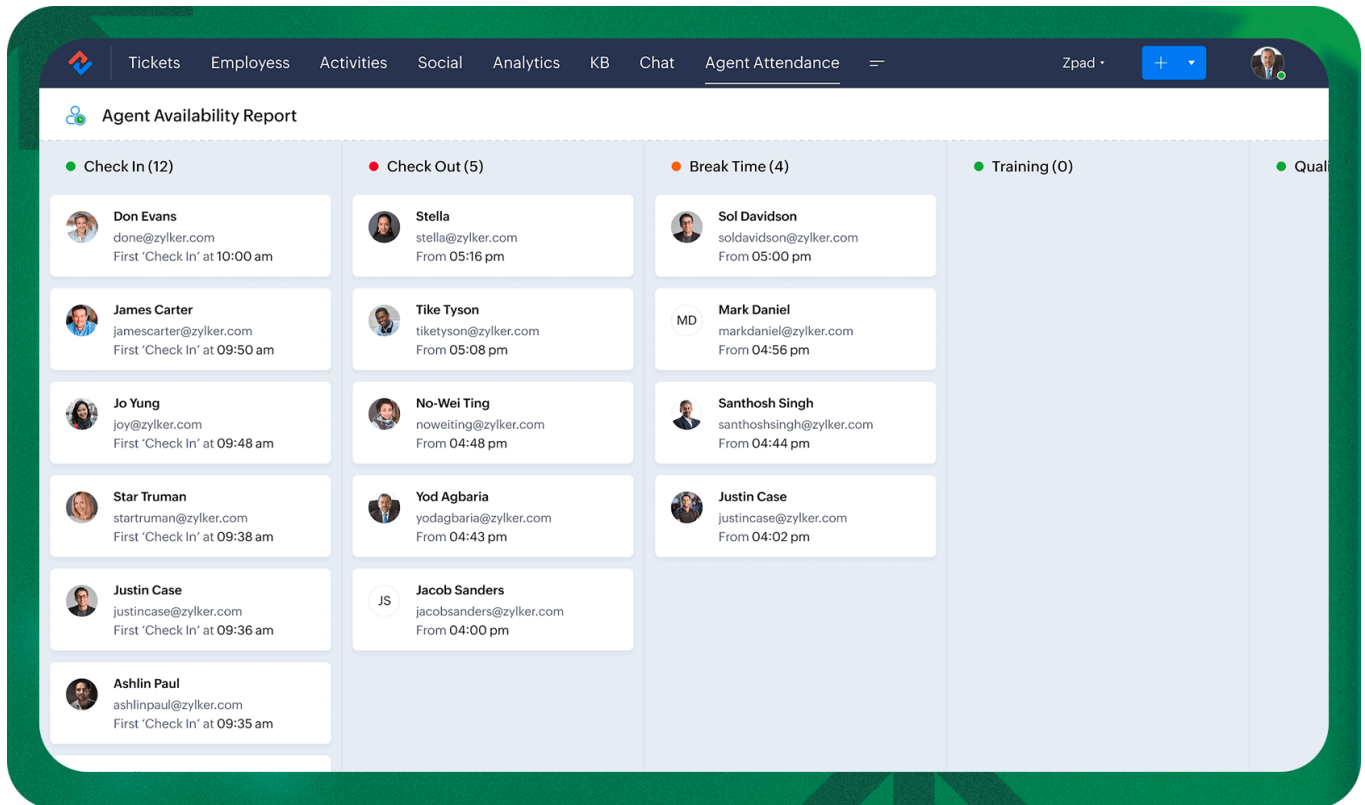
Monitoring process efficiency and productivity

Process efficiency is measured by seamless movement of any action or activity from one stage to another. Bottlenecks can be identified by closely monitoring these **transitions;** delays at certain stages could indicate that the process requires some improvement or that the employee are not working efficiently. WFM principles like **workforce allocation** and **performance monitoring** can optimize team productivity. They can also help ensure that employees have the right skill sets for their roles.

KPIs can highlight whether an employee is working efficiently, managers can easily identify training opportunities or other roles that may be a better fit for the employee. Additionally, employers can compare team-wide performance metrics and an employee's improvement against previous achievements to determine whether they need to adjust their training and development methods.

Managers can automate ticket routing by AI-based **auto-tagging** of tickets based on certain keywords, **predicting** and auto-populating field values that can quickly categorize the tickets as critical, L1 or high priority.

The **Headquarters dashboard** is specially designed for leadership to get a 360-degree view of the process efficiency and employee performance. It displays some of the critical performance metrics such as response trends, live traffic, unassigned tickets, agent attendance, happiness rating, negative ratings, and the most threaded responses, which gives a clear indication of how things are running in real-time and allows them to forecast changes for which they can prepare for well-in advance. Monitoring real-time data with the ability to compare against the past will help guide informed decision-making.
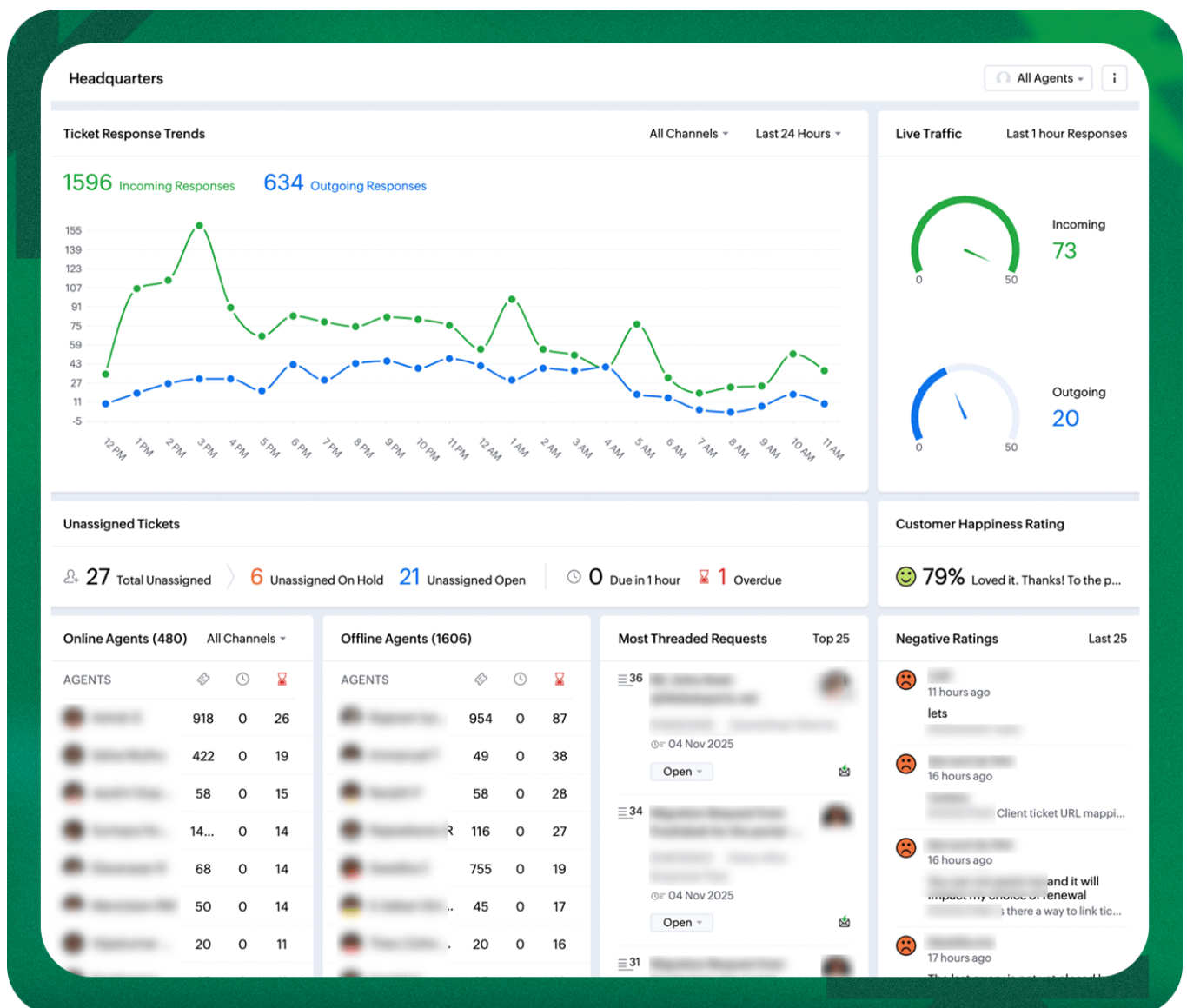
Real-time demand-supply management

Analytical tools such as SLA violation report and dashboard, agent availability, ticket status dashboard, agent vs. ticket status reports and similar other analytics are indicators of ticket handling strategy. Too many tickets under escalation or agents with multiple SLA violations require close monitoring, but these issues can occur for many reasons:

- ● The **ticket routing mechanism may need some correction. For example, if the tickets being escalated are mostly from non-English speakers and those that have violated the timeline where custom design requests. In that case, modifying the routing criteria would address the problem.**

- ● **The agent may not have the skills to handle certain type of queries. Mapping agents according to their skillsets like language proficiency, technical acumen, domain expertise allows business to route the ticket to the correct team and deliver a quicker resolution.**

- ● **A surge in tickets may have occurred during the end of a shift. Tickets can go unanswered because employees are busy closing previously handled tickets and aren't able to address those that arrive towards the end of their shift. It's possible that adjusting the shift timing such that a few agents shifts are extended by an hour would balance the situation. Allowing employees to share the unanswered tickets with the staff coming in for the next shift will also mitigate the problem.**

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○ Particular channels may be receiving more queries than agents can actually handle. Some preferred channels like Twitter, WhatsApp may be receiving more queries and have less number of agents to handle them as compared to email or phone channels. Its essential to monitor and track stage-wise ticket statistics such as the number of violations by channel or tickets vs. channel, channel-wise ticket stage to understand the incoming traffic and redistributing the agents to the right channel.

○ The field service workforce may not be allocated optimally. Most field service personnel use mobile devices to track their upcoming assignments. Employers must have the visibility of their live location to assign them to a worksite closet to their current location, which will save the time spent in travelling and also ensure the service request is addressed quickly.

The analytical tools in Desk deliver insight into these types of issues and provide businesses with real-time statistics about the incoming traffic and the efficacy of the ticket handling system. Periodic monitoring and adjustments can have a significant impact on customer service standards.

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Improved productivity with AI and smart tools

Employees should have ready access to tools that allow them to do smart work. Daily activities such as replying to customer emails, finding important customer details, following-up conversation, and creating resolutions should be simplified and automated to save time.

AI-based **reply assistant, auto reply,** and **article generation** promote self-service by allowing employees to use system generated responses to send quick, empathetic, human-like replies for customer queries. It not only saves time but also allows to maintain consistency and compliance guidelines. Similarly, the ticket conversations can be saved and published as articles in the knowledge base for reference.

Answer bots offer another user-friendly tool that quickly generates responses for tickets using the articles from the knowledge base assisting employees with finding relevant answers amidst vast information.

Chances of missing out on important details and inadvertent errors while entering field values manually can be prevented by **auto-extracting** the values, such as email, phone number, due date, case type, product code, order number, and purchase date, from the ticket conversation and auto-populating them to the ticket.

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Other essential quick-access tools that always prove handy when employees manage volumes of service requests include:

- **List views** to quickly look up frequently accessed and relevant records

- Use of **canned** and templated messages like welcome note, acknowledgement, follow-up etc. through **snippets** and **WhatsApp templates**

- **Pinning** important conversation in the ticket for other stakeholders to get a quick clear context before getting into the details

- Arranging service requests using different criteria under **work modes,** like status, priority, countdown, handshake. It chalks out a clear plan for the day by listing down the tickets that require immediate attention, nearing due-date or from a high-value prospect.

- **Scheduling replies** to ensure they reach the customers at the right time according to their time zone is important for business proficiency and also shows customers that you value their time.

- Clubbing requests received from same customer about the same issue over different channel or multiple times helps maintain a clutter-free database. It save the effort of manually checking every ticket, replying, closing them. It also simplifies handling global issues like downtime, system failures etc. where thousands tickets need agents attention. **Linking** such tickets allows the agents to send one response that is automatically sent to all the recipients.

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Employee satisfaction and user experience

Balanced workload, consistent schedule, growth opportunity, and standardized pay scale provide a better work-life balance to the employees while potentially reducing burnout. A predictable work environment allows them to thrive, connects them to the greater business goals, and motivates employees to bring their best to the table.

Finally, the user experience is also a huge part of WFM. A user-friendly, easy-to-navigate interface makes it simple for managers and employees to perform their daily activities and achieve their goals. **Mobile apps, self-service portals,** and **onboarding and training library** contributes greatly in enhancing the overall experience and stay competitive.

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