Delivering Work-Life Balance Empowerment for Contact Center Agents Using Intelligent Intraday Automation Technology

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- Larry Schwartz

Larry Schwartz
Chairman & CEO
WorkFlex Solutions LLC

CEOCFO: Mr. Schwartz, would you tell us about WorkFlex Solutions?
Mr. Schwartz: WorkFlex Solutions is a software company that provides intelligent intraday automation technology for contact centers.

CEOCFO: What is intelligent intraday automation?
Mr. Schwartz: Almost 4 million people, or roughly 2% of the US workforce work in contact centers. That translates into a lot of contact center agent work schedules to manage. Contact center operators have to forecast what future call demand will look like, schedule their agents in a way that meets this expected demand, and then deal each day with the problem of what happens if their original forecast was wrong, meaning they are either overstaffed or understaffed. Forecasting and scheduling activities are typically performed using commercial Workforce Management (WFM) systems. The last step of dealing with staffing variances is called is intraday management and although WFM systems can help identify staffing variances, the job of actually fixing these issues is largely performed manually today. As anyone that has called into a contact center and been put on hold for 45 minutes or more already knows, many contact centers experience a lot of Intraday staffing variances and it is apparent that manual intraday management is largely
ineffective at fully addressing this problem. Intraday automation involves automating manual intraday management tasks. Intelligent Intraday Automation which is what WorkFlex does, applies sophisticated real-time methodologies to Intraday Automation to go well beyond what people can reasonably be expected to perform manually. For example, WorkFlex performs continual intraday reforecasts throughout the day to accurately pinpoint when staffing variances will occur, simultaneously analyzes each staffing variance, automatically determines the optimal way to address each variance, which could include extending or reducing shifts, calling in additional staff, or rescheduling training or other activities, automatically contacts the optimal fit agents based on their skills, proficiency, current work hours, schedule change-preferences and other configurable attributes, and when the agents accept a schedule change offer automatically upgrade the schedule in the WFM system. What we are doing to transform intraday management in contact centers is a lot like what real-time supply chain methodology has done to transform intraday management for the manufacturing industry.

**CEOCFO: What do most companies really want?**

**Mr. Schwartz:** There is an organization called the American Customer Satisfaction Institute (ACSI). They have a tracking portfolio of publically traded companies that have high customer satisfaction scores or rapidly improving customer satisfaction scores relative to industry averages. For the last fifteen years the ACSI tracking portfolio has outperformed the S&P 500 by a factor of four to one. This is why when you ask any CEO what their top three strategic priorities are, invariably they will say something like “improving customer service” or “improving the customer experience”. There are a lot of industry benchmark studies that show that a very good way to increase customer satisfaction is to increase the satisfaction of the employees that interact with customers each and every day – in other words customer service agents. According to a recent MetricNet benchmark study, each 1% improvement in agent satisfaction improves customer satisfaction by 1% and reduces agent turnover by 1%. So the next question is what drives agent satisfaction? The average age of an agent in the contact center today in the US is 24 years old, which makes millennial’s the dominant contact center demographic. According to the US U.S. Chamber of Commerce Millennial Generation Research study, 75% of millennial’s say that scheduling flexibility is a primary driver of their career choices. Unfortunately, once an agent schedule is created, it is generally difficult for that agent to subsequently modify their work-hours. This clearly contributes to the high annual agent turnover which in the US is over 50%. In fact although contact center operators know that agent schedule-change empowerment is a key driver of agent satisfaction, most operators actually employ policies that institutionally restrict schedule change flexibility, such as imposing limits on schedule change requests or requiring advance notice on schedule change requests. The reason for this is the cost involved in processing agent schedule-change requests. Each change request needs to be analyzed to ensure that it does not create a staffing variance issue, it is compliant with government work rules and is compliant with corporate policies. So restrictive schedule-change policies are essentially the product of a cost-containment strategy even though these policies ultimately have a negative impact on agent turnover and customer satisfaction. This is a fundamental paradox that that the contact center industry has struggled with for decades.
CEOCFO: How are you able to help?
Mr. Schwartz: WorkFlex has introduced an industry-unique intelligent mobile app for contact center agents that fundamentally address this paradox by empowering contact center agents with the flexibility to instantly view and change their schedules anywhere/anytime, while ensuring that each staffing change actually helps solve staffing variances. The app leverages WorkFlex’s patented Intelligent Intraday Automation technology to accurately identify future overstaffing and understaffing variances and then uses this information to provide the agents with a view as to when they can add hours or reduce hours on their schedule. These schedule change options just happen to be inherently business friendly. Projected overstaffing intervals are displayed on the agent mobile app as pre-approved opportunities for agents to take time off and projected understaffing intervals are displayed as pre-approved opportunities for agents to add hours to their schedule. From a business perspective, what the WorkFlex mobile app effectively does is transform the agent-schedule change request process from a cost problem to a business benefit. The more schedule changes agents make through the app, the fewer staffing variances there are there are left for workforce administrators to address. The WorkFlex mobile app is transforming the contact center industry in a similar way to how FedEx self-tracking transformed the package shipping industry and Uber is transforming the transportation-for-hire industry. By empowering the end-users to do the work for themselves in an automated way, the end-user is happier and the business is more efficient.

CEOCFO: What do you look at as predictors?
Mr. Schwartz: Forecasting demand in a contact center is a lot like weather forecasting in that the further out you try to predict, the harder it is to get it right. If you watch your local weather report on TV, they can probably tell you with a high degree of accuracy whether it is going to rain between 4:00pm and 8:00pm today, but if you want to know whether it is going to rain between 4:00pm and 8:00pm three weeks from next Thursday - that is largely guesswork. It’s the same thing for contact centers; you can predict with a high degree of accuracy that if a service outage occurred this morning, you are going to have higher than usual call volume for the rest of today, but predicting whether a similar spike in call volume will occur outage weeks from today is almost impossible. The approach that we take is not to enable contact center operators to become a better predictor of long term call demand but to empower them with the staffing agility they need to become a better responder to unanticipated staffing variances whenever they occur. Using my weather analogy, rather than trying to get an IBM Watson computer to try to figure out if it is going to rain three weeks from next Thursday, we put an umbrella within easy reach so if it does happen to rain three weeks from next Thursday, you won’t get wet.

CEOCFO: Are there typical types sizes and industries who have embraced WorkFlex Solutions?
Mr. Schwartz: WorkFlex technology is deployed across most major industry verticals including financial services, healthcare, communications, government, and retail. Our clients include both service providers and business process outsourcers. Although our intelligent empowerment technology inherently delivers value to any size contact center operation large or small, many of the customers we serve have very large scale contact center operations with thousands or even tens of thousands of agents. Companies in highly competitive industries where
the ability to deliver superior customer service can have a direct impact on customer retention and profitable business growth such as wireless carriers, credit card companies, banks, insurance companies, and outsourcers, tend to have an especially high interest in our technology.

CEOCFO: *Is it easy to get a foot in the door to tell your story?*

Mr. Schwartz: The key to getting your foot in the door with any prospective client is understanding their top three strategic priorities and/or pain points and effectively showing how your value proposition can effectively address one or more of these. Fortunately for WorkFlex, many companies are already recognizing “employee empowerment” as a strategic priority, and we have an industry-unique value proposition for this with our intelligent employee empowerment solutions for contact centers.

CEOCFO: *Would you tell us about the variety of solutions?*

Mr. Schwartz: WorkFlex offers two employee empowerment products. The WorkFlex Agent Suite is focused on delivering work-life balance empowerment for contact center agents and includes the agent mobile app. The WorkFlex Manager Suite is focused on providing staffing agility empowerment for workforce administrators and team-effectiveness empowerment for contact center supervisors.

CEOCFO: *Do most companies use both?*

Mr. Schwartz: Yes they do. Almost all of our clients purchase both products to provide empowerment to all of their employees within their contact center ecosystem. From a staffing optimization perspective deploying both the WorkFlex Agent Suite and WorkFlex Manager Suite makes a lot of sense. The Agent Suite empowers agents with the tools to address a lot of staffing variances on their own and the Manager Suite empowers workforce administrators with the tools they need to optimally address any remaining staffing variances, including those for which may be driven by external factors such as weather. For example, what happens when you have an ice storm that may impact an agent’s ability to come to work or a news event that drives up call volumes in the center? Under these “forecasting-exception” scenarios, workforce administrators can make a manual staffing adjustment request (e.g. I need 30 more agents this afternoon) and WorkFlex will automatically figure out the optimal way to effectively deliver on this staffing increase need.

CEOCFO: *How long has WorkFlex been available?*

Mr. Schwartz: The WorkFlex Manager Suite has been available since 2010. The WorkFlex Agent Suite was introduced in 2014.

CEOCFO: *What surprised you as WorkFlex has grown and evolved?*

Mr. Schwartz: When we created the company back in 2009 we set out to address a workforce management system capability gap and provide staffing agility empowerment for workforce administrators. In 2011, we were recognized by Gartner Group as a Cool Vendor in CRM Customer Service for this industry innovation.

What surprised me was several years later when we realized that our Intelligent Intraday Automation technology could also be adapted to address the agent schedule-change empowerment issue. In addition to using WorkFlex technology outputs to provide real-time staffing agility empowerment for workforce administrators, we could leverage these
same outputs provide anywhere/anytime schedule-change empowerment for agents. We already had done all of the hard work—all that was left to do was built the agent mobile app user interface. Although the initial mission of WorkFlex was not to address agent empowerment issues, it has become clear that the WorkFlex agent mobile app is the right technology at the right time to address a critical issue for the contact center industry. In fact, our mobile app was the only contact center specific technology included in Forbes Magazine’s 5 Predictions Shaping the Future of Customer Experience for 2016.

CEOCFO: *What is involved in implementation?*
Mr. Schwartz: The good news is that our products are inherently designed to plug into existing workforce management systems. Our products are deployed as a SaaS solution and customers do not have to buy any hardware. We basically integrate with our clients existing workforce management systems wherever they are through a secure virtual private network connection. All we have to do is read the information out of these workforce management systems and then write schedule changes back into them. All of the rest is performed turnkey by WorkFlex. It is actually very straightforward to set up. Implementation cycles between signing a contract to actual production deployment can as short as six weeks which may sound like a long time but from a typical enterprise-grade technology deployment perspective is like rocket speed.

CEOCFO: *Why pay attention to WorkFlex Solutions?*
Mr. Schwartz: There are a lot of products out there that can save you money and reduce cost by providing a slightly better mousetrap to the one you have currently deployed. They are all worth taking a look at. Every CIO of a fortune 500 enterprise probably has a thousand vendors coming to them with these kind of incremental improvement solutions, but at the end of the day, a company is only as good as its employees and keeping employees happy and engaged is paramount. Agent satisfaction and engagement is a key contact center industry challenge and these are employees that have a direct impact on customer satisfaction. Companies that are serious about improving customer satisfaction should pay attention to WorkFlex. Many companies that have deployed WorkFlex have conducted agent satisfaction surveys before and after deploying the WorkFlex mobile app. Positive scores related to schedule-change flexibility that are typically less than 10% prior to WorkFlex skyrocket as much as 450% within 45 days of deployment of the app. This represents a massive improvement in a very short amount of time. The impact to contact center operations is equally impressive. At a 2015 industry conference, a WorkFlex client reported that over 90% of all their contact center schedule changes were now agent-initiated, and automatically approved through WorkFlex meaning that agents were addressing the vast majority of staffing variance issues, and agent utilization had increased by over 4 hours/agent per month. If companies are looking for new technology that can make a significant positive impact right now to a major business challenge they face today, WorkFlex is one of those few technologies out these out there that can do this.

*Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine*