



Why WFM Projects Fail – and How to Avoid That Outcome

Many in the workforce management (WFM) field have seen it happen time and time again: companies implement a WFM program in their contact center, and yet, months later the software just sits there, unused, with everything running exactly the same way as before. Inefficiencies run rampant once again, with the same old manual scheduling being managed with Microsoft® Excel® spreadsheets.

Why does this seem to be a regular occurrence? Why is it so hard to make WFM implementations work? This brief presents four recommendations that may help your contact center combat problems before they arise.

1. Have the Right Skillset in Place Before the Solution is Implemented

Recognize that workforce management (WFM) is as much a skills-based process as it is software-based. Simply launching a new program will not solve your problems. Those unfamiliar with the concept of WFM can't simply jump in and expect to manage the software successfully. Prior to starting the project, it is essential to ensure that the right skillsets are in place. For this reason, the project team must be made aware if properly skilled staff is not available at rollout. Equipped with such knowledge, the training team can properly judge what needs to be taught and if necessary provide additional training to ensure that administrators have the required skills to implement a successful program.

Do not assume that your internal team can be used to “crowd-source” your WFM program. Assigning the responsibility of forecasting and scheduling to each team leader creates problems and causes conflicts of interest. Instead, one administrator, without any vested interest in making a particular group look good, should single-handedly run the show. Keep in mind that this applies to the entire contact center, not just for the one team lead who understands how the game is played.

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2. Focus on the Benefits

Having a clear understanding of how the new WFM features can benefit the contact center will help immensely over the course of the project. Clearly document how and why the new system will be good for both the agents and the organization and continue to communicate these benefits over the course of the project.

Your agents will not be able to guess why they will appreciate the coming changes, so be proactive in explaining the benefits with statements like these: “Rather than just using a predetermined number, the new WFM system allows flexibility on the number of agents that can be off for vacation on any given day” or “With the new system, we’ll be able to add extra vacation days because we’ll know more precisely what our service levels will look like for any given day that you may want to request time off.”

“Clearly communicate how and why the new WFM system will benefit both the agents and the organization.”

3. Get Management on Board

Without executive sponsorship, any project potentially runs into difficulties. Enlist executive support from the outset and rely on his or her assistance in making the business case and rallying the troops. This essential step will go a long way toward making the project successful.

Besides executive sponsorship, floor supervisors are influential in making the project turn out as planned. If floor supervisors are not on board, the probable risk increases of having them sabotage the effort with the agents. So explain the inherent benefits of the software and seek their support. Clearly articulate how the new system will make their day easier, how it will help them have more time to coach and develop their agents, etc. When these points are understood, the floor managers will become evangelists rather than opponents. Finally, and it should go without saying, make sure these new allies are included in the various training sessions.

“Enlist floor managers so they become evangelists rather than opponents.”

4. Last but Not Least, Don’t Rush It!

Often WFM failure is due not only to the lack of being properly prepared at the outset but also because teams try to rush the implementation, taking on more than they can reasonably achieve in shortened timeframes. Yes, it is easy to be excited about new projects, but jumping right into WFM implementation with both feet is not the best way to tackle the complex technical, procedural, and cultural issues that you’re hoping to improve. Nothing kills a new project faster than neglecting to earn the buy-in of the agents and administrators whom you are trying to help.

Introducing concepts and procedures to contact center staff demands time for adjustment, as well as time to work out any process kinks. For this reason, it is important to roll out the project gradually: identify and address issues as early as possible and add new processes and features incrementally. For example, don’t introduce vacation planning to a group of 500 people all at once. Instead, ease into the rollout, starting with a “beta” team of eager and willing agents. Take time to fix any bugs that emerge. Then, little by little, introduce the new process to the rest of the agent pool, making sure they understand the concepts and have time to digest the changes so that they can fully embrace it.

After all of the program features have been introduced, plan for a 12 to 18-month period before expecting to have the system running at peak efficiency. Slow and steady wins this race!

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Conclusion

By following these four recommendations, the chances for a successful rollout of a new automated WFM system are greatly improved. The new system will not only make everyone’s day-to-day working life much easier and so much more rewarding, it will also deliver greater employee engagement, lower rates of attrition – and ultimately higher levels of satisfaction for customers.