



Shift Bidding and Agent Preferences: Approaching Millennials with Options

The Problem with Shift Bids

When one examines a shift bid process closely, some apparent flaws start to appear:

- Shift bids are time consuming, and often return little in the way of efficiency.
 - It takes weeks upon weeks to execute, and in most cases, the schedules are very similar to the ones that were in place before the bid.
- Shift bids fail to take into account the constantly changing landscape of call volume forecasts.
 - If a shift bid is designed around the first week in September, how does that solve scheduling issues in the third week of November?
- Shift bids cause an inordinate amount of stress on the agents.
 - Agents care first and foremost about their schedule; if management is making them worry about their livelihood, they aren't focusing on taking calls.
- Shift bids cause the contact center to be locked into a set of schedules that allow for almost no flexibility.
 - Overtime too often becomes necessary to fill in the gaps, causing payroll costs to rise, as well as agent fatigue.

The Answer – Focus on Agent Availability and Preferences

Instead of going through a cumbersome shift bidding process that gives little in return, OpenText has put into place a mechanism that increases agent satisfaction and service levels and decreases agent attrition. Imagine being able to ask every agent, for every day, what hours he or she is able to work and what hours are preferred. How refreshing! Now, instead of forcing agents to work shifts during which they are unavailable (or would prefer not to work), administrators can ask them for input as to their preferred schedules.

Here is the process:

1. Each agent fills out a weekly availability and preference calendar in his or her agent portal (no paper involved).
 - a. Each agent can be very specific about a preferred schedule; doctor's appointments, child care issues, and personal issues can all be addressed without personal time off (PTO).

EXECUTIVE SUMMARY

Instead of a cumbersome shift bidding process, OpenText has put into place a mechanism that allows you to base shifts on agent preferences, increasing agent satisfaction and service levels and decreasing agent attrition. Agents submit their preferred hours and the scheduling team runs it through the program. Analysis shows what hours are lacking and schedules are adjusted accordingly. This process is not only easier for your organization but also makes agents feel more empowered and valued.

ABOUT OPENTEXT WFO SOFTWARE

OpenText WFO Software has a 32-year history of innovation and provides enterprise contact centers with call recording, integrated workforce optimization, and advanced analytics. OpenText™ Qfiniti, is a modular WFO suite that includes tools to optimize workforce management, quality monitoring, liability recording, coaching and eLearning, performance management, and surveying. OpenText™ Explore provides speech and Voice of Customer analytics that enable the discovery of customer behavior insights in multi-channel, multi-language contact center environments. Learn more at opentext.com/qfiniti

2. The scheduling team runs the schedule, granting everyone the preferences they have asked for (with zero commitment to the agent at this point).
3. Schedule analysis shows where coverage is lacking (not everybody can work from 8 a.m. to 5 p.m.).
4. Agents' preferences can be "pulled back" to grant the system flexibility to adjust schedules and to make sure proper coverage is attained.
 - a. The process of "pulling back" preferences can be done by a number of different methods.
 - b. For example, the top 10 percent of your agents can get 100 percent of their preferences, while the next 20 percent receive 80 percent of their preferences, and so on.
5. Schedule analysis shows that after all preferences have been taken into account, proper coverage is attained.
6. The schedule is published.

Benefits

The primary benefits of using agent preferences are:

- Agents feel much more empowered and valued as employees;
- Schedules are significantly more in line with the forecast;
- Agents have incentive to "move up the ladder" to get more of their preferences granted;
- Overtime is reduced, as agents have flexibility to move shifts within the schedule; and
- Over time, the shift bidding process enabled by OpenText Qfiniti Workforce Ultimate leads to less administrative work, happier agents, and more efficient schedules.