

OpenText™ Qfiniti Workforce

Expedite superior contact center forecasting and scheduling with robust yet flexible workforce management

The OpenText Qfiniti integrated product suite for multichannel contact centers enables organizations to improve efficiency, increase employee productivity and control staffing expenses with powerful workforce management.

Deliver Superior Customer Service

Contact center performance, from both a customer service and a workforce management perspective, is paramount to the success of your business. With the right technology and features in place for consistently delivering the highest level of customer service, the contact center can become one of your most effective competitive differentiators in the marketplace.

OpenText Qfiniti Workforce delivers best-in-class workforce management, enabling robust team interaction and collaboration while executing workforce management strategies unique to your business.

Easily Forecast Staffing Requirements

Effective workforce forecasting begins with highly integrated interface portals that manage immediate and accurate communications between administrators, schedulers, supervisors and agents. Qfiniti Workforce differentiates itself in the market because it is built on a flexible communications framework that enables contact centers to rapidly flex their workforce based on current conditions, with a speed and efficiency unlike any other solution on the market. This framework connects agents and schedulers, regardless of location or preferred communication channel, enabling you to create an extremely agile workforce.

Qfiniti Workforce delivers a flexible “what if” analysis tool kit for staff planning that allows you to accurately model a wide variety of industries and customer behaviors. On demand selection of any one of five different methods brings advanced flexibility to forecasting future staffing demands:

1. **Most recent “x” weeks:** Forecast demand using the traditional legacy approach that is based on the most recent “x” weeks of past transactional data using an average or weighted average of those weeks and flexibly apply any number of weeks for the calculation.

PRODUCT HIGHLIGHTS

- *Multi-skilled forecasting and scheduling with “what-if” analysis*
- *Interactive agent shift bidding*
- *Intraday management with advanced agent adherence*
- *ASAP intraday schedule change automation*
- *Integrated communication tools*
- *Modern architecture, easy to deploy and manage*
- *Extendible integration with complementary technologies and other external systems*

2. **Specific weeks:** Rather than most recent 'x' transactional data, select specific weeks to be referenced for forecasting, such as the last four Monday holiday weeks to forecast for an upcoming Monday holiday week.
3. **Date-range-based forecasting:** Because customer behavior is sometimes triggered by business-driven events, such as catalog drops or seasonality, date-range-based forecasting enables you to source past date ranges to forecast for similar date ranges in the future.
4. **External data-based forecasting:** Upload data directly from Microsoft® Excel® for forecasting purposes, an option particularly convenient for BPOs looking to onboard a new client who need to use associated call data to properly dimension staff and calculate cost to provide the necessary support.
5. **Manual-based forecasting:** Create a simple forecast based on manually entered data if, for example, nothing in your ACD (Automate Call Distributor) history reflects what is about to happen.

shifts in steps

- Composite scheduling using mix and match approaches within a given week

Staffing requirements

| | Hours | FTEs |
|--------------------------------|-------|------|
| Baseline requirements | 3467 | 433 |
| Discretionary requirements | 415 | 52 |
| Non-discretionary requirements | 263 | 33 |
| Total shrinkage requirements | 678 | 85 |
| Total adjusted requirements | 4145 | 518 |
| Gain in staffing requirements | 27% | |

Click here to customize the forecast participants and review cross-training cluster reports

Steps to success

- Generate clusters
- Generate forecast
- Generate from profiles
- View forecast reports
- Revise forecast data
- Publish forecast data

Qfiniti Workforce provides an easy-to-use Steps-to-Success process for ensuring accurate staffing forecasts for workforce exceptions and specific business cultures.

Accurately Calculate Single and Multi-Skilled Scheduling

Once users have modeled their demand, they can rely on Qfiniti Workforce to accurately calculate headcount by interval using the traditional single-skilled, Erlang C math combined with our proprietary multi-skilled algorithm. Workforce then displays the efficiency associated with the cross-trained agents in multi-skilled contact centers. This allows users to project “what if” scenarios of their agents’ optimal skills mix.

Forecasting multimedia agents (for email, chat, and phone channels) requires multiple service-level expressions, and Workforce supports three different options:

- Telephone service factor: 80/20: 80 percent calls answered in 20 seconds
- Average speed of answer: Answer all calls in “X” seconds
- Deferred service level: For back office, chat and email scheduling

Additionally, Workforce enables contact centers to forecast their customer demand in order to anticipate staffing exceptions, as well as specific business culture requirements.

- **Planning for overhead:** Track agent exceptions that vary by time of day and day of week – perhaps more of your agents call in sick on the Monday early shift than on a Tuesday afternoon shift – enabling you to track those exceptions and build overhead into your staff planning process; similarly, track the right number of people throughout each day by considering late time, sick time, and adherence violations.
- **Multi-skilled scheduling:** Develop schedules following an easy-to-use Steps-to-Success process that accommodates a wide variety of schedule cultures, from the financial and insurance industries to technology companies and even unionized contact centers:
 - Fixed shift hours, for example 8 a.m.-5 p.m.
 - Floating shifts assigned based on agent rankings, skills, preferences and availability
 - Common day floating shifts with the same daily start time
 - Shift rotations fairly rotated through early, late or weekend

Effectively Manage Scheduling Cultures and Reward Agent Behaviors

Qfiniti Workforce supports a wide variety of scheduling cultures and assigns shifts considering unique agent rankings, skills, seniority, preferences for start time and days off, and hours of availability. It enables supervisors to control and reward agent behaviors by building custom agent rankings into the schedule assignment process.

Inventory preview for Bid Phase 3

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Important dates: Bid open date: Tuesday, April 23 2013 12:00 AM; Bid close date: Monday, June 17 2013 12:00 AM; Bid effective date: Monday, July 01 2013 12:00 AM

| Item ID | Weekday | Earliest Start | Latest End | Preference Score | Activity Score | Current Bid Score |
|---------|---------|----------------|------------|------------------|----------------|-------------------|
| 1619 | Monday | 08:45 AM | 05:15 PM | 101.60 | 100.00 | 1.38 |
| 1604 | Monday | 08:30 AM | 05:00 PM | 101.35 | 100.00 | 7.64 |
| 1606 | Monday | 08:30 AM | 05:00 PM | 101.35 | 100.00 | 6.05 |
| 1605 | Monday | 08:45 AM | 05:15 PM | 101.60 | 100.00 | 6.34 |
| 1617 | Monday | 08:45 AM | 05:15 PM | 101.60 | 100.00 | |
| 1613 | Monday | 09:00 AM | 05:30 PM | 101.35 | 100.00 | |
| 1608 | Monday | 09:15 AM | 05:45 PM | 101.35 | 100.00 | |
| 1610 | Monday | 09:15 AM | 05:45 PM | 101.60 | 100.00 | |

Qfiniti Workforce allows you to control and reward agent behaviors by building custom agent rankings into the schedule assignment process.

Use the advanced Workforce agent bidding features to reward your best agents and delight your customers by making the most effective agents available to support customer needs.

- **Interactive agent shift bidding:** Present available shift inventory to agents within their portal with a fully integrated bidding function, and as higher-ranking agents make their selections, an agent’s inventory of shifts will reflect, by color code, the likelihood of holding a particular shift selection; agents can use the social media standards of “like” and “dislike” to further sort their inventory of shift options.

Streamline Intraday Management and Adherence

Schedulers can easily monitor the completion of the bidding process. Once complete, a single mouse click executes the entire bid, assigning the shifts to the agents based on the criteria. Each agent receives a notification “memo.”

One of the six communication channels available within Qfiniti Workforce, this assignment memo indicates that a schedule for the week is available for review. In this way, Workforce not only streamlines the bidding process but also provides a better workforce experience with visual queues that manage agent expectations and improve agent satisfaction.

- **Intraday management:** Quickly assess the variance between forecast to actual using the Intraday Performance Report and let Workforce automatically reforecast the balance of the day based on that current day’s trend.
- **Advanced agent adherence:** Benefit from three distinct views of adherence and the option to include the agent photo, enabling a personal connection with your agents; keep agents on track and in adherence with gentle pop-up reminders

of upcoming scheduled events, such as breaks, lunches, eLearning and meetings; and aggregate adherence metrics by agent, group, activity, and site or by the enterprise with prominent displays for on- and off-phone activity.

- **Service Level Management (SLM):** View service level data that is prominently displayed throughout the forecasting, scheduling and intraday management reporting tools, and rely on the intraday service-level dashboard that features forecasted data and SVL, as well as the SVL observed by current interval, hourly for the day or for the week.
- **ASAP – Intraday schedule change automation:** Leverage convenient drag and drop controls that make one-off schedule changes, such as call outs and tardiness, just as legacy applications do today and that enable analysts to quickly delete or modify schedules for dozens—even hundreds—of agents; select how these changes are communicated to the agents using Workforce’s two-way communication channels that enable agents to receive, review, and accept or deny offers, such as overtime and voluntary time off.

OpenText Qfiniti Workforce Benefits



For IT

- Modern, fault-tolerant ACD integration to more than 20 different ACDs
- Browser neutral and nothing to install on the desktop
- Microsoft® Windows® 2008, 2012, MS SQL 2008, 2012 support
- Installed and integrated with your ACD remotely



For The Agent

- Multi-skilled forecasting
- Superior ease of use, modern interface
- Built-in “Steps-to-Success” guides
- System-wide process wizards
- Extensive, effective graphical data displays and reports



For The Company

- Licensed by named agent only: unlimited site, administrator, scheduler and supervisor licenses
- Free software upgrades under standard maintenance

| INTERACTION RECORDING | DESKTOP CONTROL | PERFORMANCE MANAGEMENT | DESKTOP ANALYTICS | CUSTOMER SURVEYS | ANALYTICAL SCORING | WORKFORCE MANAGEMENT | ONLINE TRAINING | VOC ANALYTICS |
|---|-------------------------------------|---|--|---|--|---|--|--|
| Multichannel Capture PCI DSS Compliant | Muting & Masking Metadata Attach | Quality Monitoring Evaluation Planning | Application Monitoring Real Time Guidance | Multichannel Surveys Integrated & Actionable | Automated Scoring Speech Enabled | Scheduling & Forecasting Mobile Engagement | Integrated e-learning SCORM Compliant | Multichannel Connectors Centralized VoC |
| Qfiniti Observe | Qfiniti ICE | Qfiniti Advise | Qfiniti Optimize | Qfiniti Survey | Qfiniti AutoScore | Qfiniti Workforce | Qfiniti Expert | Explore Analytics |
| OpenText Explore Voice of Customer - Multichannel Analytics | | | | | | | | |
| Qfiniti On-Premises Modular WFO Suite | | | | | Qfiniti Managed Services Managed WFO Appliance | | | |

Setting a new benchmark for workforce optimization, the OpenText WFO Software portfolio includes the full suite of OpenText Qfiniti products, engineered to operate seamlessly together. They can be deployed as a single, comprehensive solution or as individual, standalone products to solve your

most urgent contact center management needs. OpenText™ Explore delivers Voice of Customer, speech and multichannel analytics; and OpenText Qfiniti Managed Services provides the entire Qfiniti portfolio on a managed, high density server system. opentext.com/qfiniti

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