



align

Workforce Management

SOLUTION BRIEF

► NOW YOU CAN:

- Increase customer satisfaction and revenue growth by ensuring your most talented agents are available to help your best customers
- Reduce operational costs through accurate forecasting and precise resource scheduling
- Use a feedback loop and a cycle of continuous improvement to improve agent productivity
- Optimally match your forecasted workload to your workforce while reducing the margin of error
- Increase employee satisfaction, retention, and productivity by integrating agent preferences into the scheduling process
- Minimize the impact of crisis management and intra-day changes
- Improve decision-making by communicating high-quality information on operations and productivity
- Use industry benchmarking to Manage to Excellence™, not averages

MANAGING YOUR WORKFORCE TAKES MORE THAN A SCHEDULE

For many companies today Workforce Management (WFM) is simply developing a schedule of when contact center agents are needed based on anticipated call volume. While the schedule may consider the specific skills of each agent, it seldom considers agent proficiency, likely doesn't accommodate their personal schedule preferences, and completely fails to incorporate productivity feedback to indicate how well the schedule is performing. Without all of this, you can't make iterative improvements that, over time, result in significantly more productive and efficient schedules and more effective contact center operations.

The limited scope of current WFM practices also can result in significantly hindering a company's financial performance. Overstaffing increases costs, understaffing hurts service levels and customer satisfaction, revenue opportunities are missed by not having the best agents available to close on up-sell opportunities, and agent burnout and turnover rise due to inflexible schedules that don't meet their personal requirements.

A COMPLETE VIEW OF OPERATIONS

Blue Pumpkin® views Workforce Management as much more than the conventional definition, which often is limited to forecasting and scheduling. WFM must include all of the tools and information required for a closed-loop view of contact center activities, providing the ability to see how well the schedule is working and improving on it iteratively. It provides personnel at all levels with visibility into actual agent activity and productivity and the ability to identify specific areas where agents need improvement.

Blue Pumpkin Workforce Management therefore consists of:

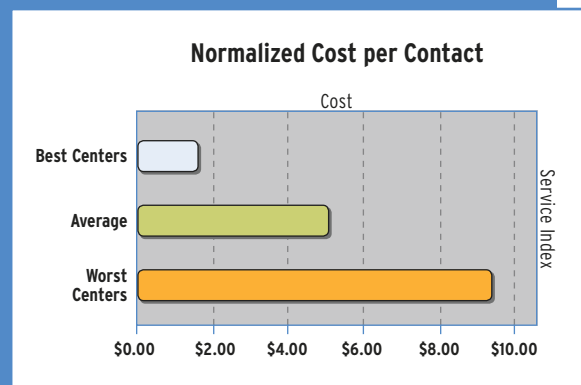
- Forecasting & Scheduling
- Time and Activity Monitoring
- Productivity Management

Forecasting & Scheduling. Based on knowledge of the specific skills, capabilities, and preferences of each agent, companies must develop a schedule that aligns those skills to where they can offer the greatest benefit. Blue Pumpkin Workforce Management solutions facilitate leveraging the unique talents and preferences of each employee, ensuring that the skills and proficiencies of each individual agent are aligned with your business objectives and customer needs.

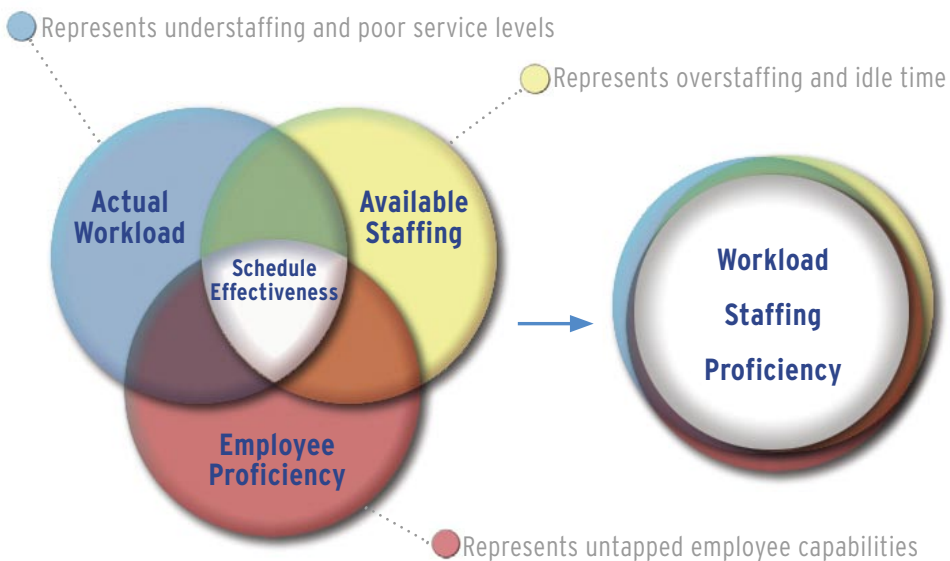
Industry Benchmarking for Contact Centers

Blue Pumpkin Contact Center Performance Benchmarking provides the context, data, and industry-specific expertise companies need to effectively measure and improve performance. Featuring elements from Blue Pumpkin and Gartner Measurement, this benchmarking offering creates the industry's first complete approach to driving highly differentiated customer service and creating competitive advantage through the contact center.

Blue Pumpkin offers three specific Gartner Measurement benchmarking capabilities that together are essential to a successful benchmarking practice: 1) the right KPIs for measuring contact center performance; 2) benchmarking data based on hundreds of consulting engagements; and 3) consulting services to identify and implement the optimal mix of KPIs for your industry and specific corporate objectives.



One example of the insights benchmarking data can provide is that high-quality service doesn't have to cost more, as shown above. The Best Centers are the 25% of contact centers represented in the database that have the highest score consisting of a weighted average of cost (40%) and service level (60%).



Let Blue Pumpkin help introduce a continuous feedback loop into your Workforce Management process that aligns your available staffing, employee capabilities and proficiency, and forecasted workload. Aligning these three key elements decreases the margin of error in your scheduling practices, increasing schedule effectiveness and minimizing operating costs.

Activity Monitoring. As agent activity becomes more varied, it's of critical importance to have a 100% view into all agent activities. Real-time activity tracking not only ensures that everyone is doing what they're scheduled to do, it enables managers to make immediate adjustments when service levels start to drop or agents are not in adherence for any reason. For example, according to The Call Center School, the cost of non-adherence of just one agent in a 50-agent center is a 60% increase in Average Speed of Answer! Non-adherence, even slight variations, can dramatically deteriorate service levels, even though many out-of-adherence situations are appropriate and in the best interest of the customer. Therefore, modern activity tracking also enables centers to fully understand and manage adherence exceptions to improve overall center adherence, achieve service goals, and reduce shrinkage.

Productivity Management. Scheduling an agent and making sure they're in adherence is simply not enough because there's no indication of how well that agent is performing. Measuring productivity lets managers and schedulers know what each agent is actually capable of, where they excel, and where they may need additional coaching or training. This important feedback also boosts agent morale, as agents want to know how well they're doing and how to improve.

Conventional WFM tools fall short in that they focus exclusively on the agents. Blue Pumpkin realizes that it's essential also to track the activity and manage the productivity of other contact center employees. To continually improve operations, it is just as important to know who are the best schedulers, supervisors, non-phone agents, and managers and what makes them better, as it is to know who are your best agents.

But what do you measure against? Peer benchmarking is essential for recognizing and rewarding your top performers and for motivating others to match your best employees. But, if your frame of reference is only internal, then you're missing the opportunity to learn from the performance of competitors and centers that are similar to yours. Blue Pumpkin offers industry benchmarking from Gartner Measurement to provide you with the necessary context and performance targets to achieve competitive advantage through your customer service operations.

BALANCE PROFITABILITY, CUSTOMER SATISFACTION, AND EMPLOYEE RETENTION

Improve customer service effectiveness by making sure you put your people into the situations in which they can be successful and excel. Doing so has been proven to improve employee satisfaction and retention, as well as improve the overall effectiveness of your operations.

Our comprehensive approach to Workforce Management helps companies effectively deploy their contact center employees, achieving the optimum balance of:

- Corporate profitability through cost savings and revenue growth
- Customer satisfaction and loyalty
- Employee satisfaction and retention

BLUE PUMPKIN WORKFORCE MANAGEMENT

We offer the necessary applications and services to provide a complete view of contact center activity, efficiency, and productivity. Specific offerings that comprise the Blue Pumpkin Workforce Management solution are Director Enterprise, Activity Manager, Advisor Express, Contact Center Performance Benchmarking, and Professional Services.

Director Enterprise. Our industry-leading forecasting & scheduling application matches agent skills and preferences to forecasted demand across all communications channels, helping you to achieve your service levels and maximize agent retention with the most efficient schedule possible.

Blue Pumpkin Director Enterprise:

- Helps you leverage the unique talents of each employee by matching customers with employees according to the employees' individual skills
- Combines forecasts based on your past business trends with your contact center work rules and individual agent skills to show you exactly which people to schedule in order to meet your service goals balanced with your employee needs
- Graphically presents the impact that alternative scenarios have on staffing and service levels, which enables managers to make intuitive and real-time schedule adjustments in reaction to your constantly changing staffing picture
- Provides a powerful gap analysis tools that shows exactly who you need to hire and what you need to spend to keep up with the changing business goals of your company
- Allows agents to bid for shifts and provide input into their own schedules, increasing flexibility as well as employee satisfaction and retention

Activity Manager. Our multi-channel adherence application provides a 100% view, in real-time, into all activities in your contact center. By ensuring employees work on assigned activities as scheduled and accurately tracking how employees actually use their time, Activity Manager increases productivity, accountability, and management effectiveness.

Activity Manager tracks schedule adherence across all contact channels, including phone, email, web chat, white mail, research, and back office activities, and ensures that direct labor expenditures are minimized. It's the only real-time adherence application in the industry that comprehensively collects and displays data on how employees are spending their time throughout the day, and where there are discrepancies in the schedule. And, Activity Manager's powerful exception management and centralized tracking capabilities streamline work processes and improve employee morale by ensuring that employees are correctly recognized for work performed.



JetBlue selected Blue Pumpkin Workforce Management solutions to help solve the extraordinary challenges of a virtual contact center where 75% of the agents are stay-at-home moms. JetBlue can now offer more flexible and shorter work schedules while ensuring adequate coverage during peak customer service periods.

The results include \$1.2 million in performance improvement benefits representing a 350% ROI in the first year, 38% improvement in service levels, and a 50% decrease in management workload per agent.

"Blue Pumpkin gave us visibility into our people, which enabled us to quickly and strategically implement the right changes. These motivational, productivity, and financial benefits ultimately mean our customers receive the best service and the lowest airfares."

Julie Strickland
Call Center Analyst
JetBlue



Mitsubishi Motors of North America is using Blue Pumpkin Workforce Management solutions to gain the operational visibility it needs to steer its workforce towards business targets. The company can now more effectively match agents with customer demand, avoiding expensive hiring costs, and offer flexible work options to accommodate agents' work preferences.

Mitsubishi has seen a 38% improvement in operational efficiency, 18% improvement in service level delivery, and 19% increase in agent productivity since deploying Blue Pumpkin workforce management.

"We are very please with the results we've seen. Blue Pumpkin was the solution we needed to maximize the performance of our people — the engine that makes our company run."

Rebecca Caldera
Project Development Manager
Mitsubishi Motors

Advisor Express. Blue Pumpkin's innovative, quick-deploy Productivity Management application gives you a clear understanding of how your contact center is performing—down to the individual agent level. Advisor Express turns your mountains of raw data into actionable information and operational insight, allowing you to improve productivity, identify specific areas needing improvement, and streamline communication across all levels of the organization.

Developed from our experience with over 1,000 customers and Gartner's expertise, Advisor Express comes with a pre-packaged set of Gartner Measurement-endorsed Key Performance Indicators (KPIs). Through role-appropriate "dashboards" Advisor Express shows managers, schedulers, supervisors, and agents their productivity against personalized goals established for each KPI and against top-performing peers.

Using the detailed productivity analysis provided by Advisor Express, you can position your strongest agents where they're most needed while developing strategies to train those that need improvement. Also, Advisor Express empowers and motivates your staff to improve by giving them visibility into how they're performing relative to their peers and their goals.

Performance Benchmarking. Industry benchmarking is the process of measuring business performance against that of peer contact centers and competitors, rapidly identifying where your organization leads and lags in customer service. This enables managers to focus their efforts on where improvement is needed most.

Blue Pumpkin Contact Center Performance Benchmarking provides the context, data, and industry-specific expertise companies need to effectively measure and improve performance. Featuring elements from Blue Pumpkin and Gartner Measurement, this benchmarking offering creates the industry's first complete approach to driving highly differentiated customer service and creating competitive advantage through the contact center.

Blue Pumpkin and Gartner Measurement offer three specific capabilities that together are essential to a successful benchmarking practice:

- **The Right KPIs**—Gartner Measurement has identified the KPIs that, based on their knowledge and many years of experience, are the best metrics for gauging contact center productivity.
- **Benchmarking Data**—Through thousands of client engagements Gartner Measurement has developed and regularly updates a database of industry-specific and peer contact center benchmarking data.
- **Consulting Services and KPI Selection**—For companies that want to implement a customized performance management initiative,

Gartner Measurement offers deep industry expertise to help companies select and implement the optimal KPIs for their market segment and specific business objectives.

Professional Services.

- **Strategic Consulting**—Blue Pumpkin offers deep expertise in contact center best-practices gained from hundreds of WFM implementations. Our seasoned team works with you to evaluate the people, processes, and technologies required to execute your WFM strategy. We help identify, quantify, and prioritize specific initiatives and changes to your business practices, and then work with you to develop a road map for successful implementation.
- **Implementation Services**—Our consultants work closely with your company's management team and employees to successfully and efficiently implement your chosen WFM solutions. Our implementation methodologies, based on extensive experience and industry best practices, are structured to allow you to focus on your core business, while our project team works with your managers, supervisors, and employees to enable change.
- **Change Management**—Effectively managing workforce performance requires fundamental process and cultural changes for many organizations, and managing this change can be the most critical part of any WFM initiative. During implementation we use proven Change Management techniques, working directly with employees and unions to obtain their buy-in, resulting in successful adoption of new practices, policies, and initiatives.

The entire Blue Pumpkin Workforce Management solution—featuring Director Enterprise, Activity Manager, Advisor Express, Performance Benchmarking, and our Professional Services—enables you to focus on what's most important and where you can have the greatest impact on center operations. Contact us for more information on how you can create your own cycle of continuous improvement, constantly decreasing the margin of error in your scheduling practice.

ABOUT BLUE PUMPKIN

Blue Pumpkin provides industry-leading workforce optimization solutions that improve the performance of a customer contact center's most important and valuable asset—its people. Addressing critical business challenges and creating competitive advantage with both innovative technology and best-practices professional services, we help our customers Balance and Optimize™ three critical and often competing priorities: business growth through customer loyalty, employee satisfaction and retention, and operating costs. Blue Pumpkin solutions deliver proven value to more than 1,000 organizations worldwide such as ADP, AT&T, DirectTV, eBay, JetBlue Airways, Toyota, and Visa.



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