

# Ensuring Workforce Optimisation Effectiveness

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Refocusing on customer service effectiveness

The value of non-quantifiable workforce optimisation benefits

Aligning WFO with improved Customer Engagement

Externalising customer focus with WFO

Enabling more strategic Customer Management activities

A leading independent Workforce Optimisation specialist

## 1 Refocusing on customer service effectiveness

While Workforce Optimisation (WFO), with its many different technology components and processes, represents a powerful approach for customer service organisations looking to secure contact centre efficiencies, it also has a critical role to play in enabling customer service effectiveness.

Traditionally contact centre management has been tactically focused on efficiency, and that should always remain an essential goal. However there are other, potentially more beneficial uses of contact centre management resources than simply a relentless pursuit of efficiency. Research firm Gartner, for example, suggests that the benefits of an integrated WFO solution can enable information, insights, workflow and core contact centre functions to be 'melded so that they complement and align with the business' high-level strategy'.

An effective contact centre optimisation strategy means ensuring that the goals your contact centre is focused on actually relate to – and support – your organisation's broader business goals. While traditional, time-oriented metrics can show efficient contact centre resource usage and quantifiable service-level performance, it's perhaps a mistake to assume that there's a direct link between this and more qualitative enterprise goals such as customer satisfaction or customer retention.

**That's why WFO has such an important role to play in helping contact centres to not only refocus on customer service effectiveness, but also share their expertise with the rest of the business.**

Today's contact centres find themselves right at the heart of customer engagement, carrying out an ongoing dialogue with current, returning and churning customers – and also engaging with the many customers who have had to escalate their enquiry to the contact centre from other channels.

Effective WFO is all about successfully integrating WFO technology components such as workforce management, quality monitoring, performance management, customer surveys and customer service analytics, and successfully uncovering the business trends and root cause of employee and customer behaviours. Done right, WFO helps to inform the right decisions and contributes directly to ensuring service excellence. However it also places an increased focus on the contact centre, and its agents and managers, and on making sure that they have the right training, development and coaching to deliver the right behaviours for customer service success.

## 2 The value of non-quantifiable Workforce Optimisation benefits

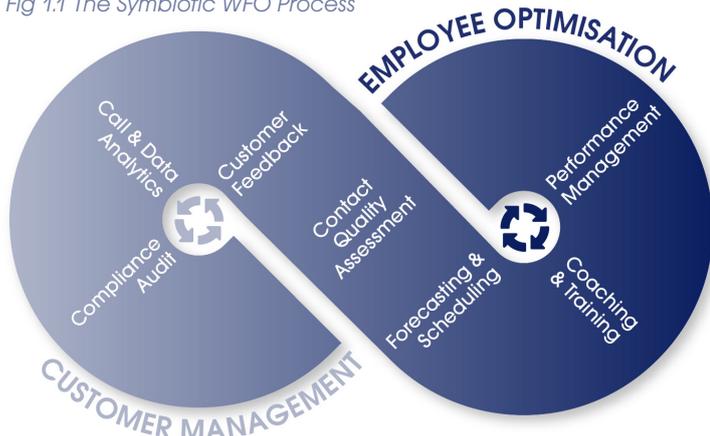
One of the challenges organisations face when looking at Workforce Optimisation, is how to actually break it down and practically apply it to a business operation. A fully integrated WFO approach might combine technologies from many previously silo-ed functional domains, such as workforce management and strategic resource planning, call recording and quality monitoring, training and eLearning, performance management, surveying and feedback, and interaction analytics such as speech analytics and emotion detection.

These distinct WFO components of course realise different benefits. Projects such as Workforce Management, managing PCI (Payment Card Industry), and FCA (Financial Conduct Authority) compliance all help to reduce business risk, and can be apportioned a finite but recurring financial benefit focused around cost/productivity.

The potential value of non-quantifiable workforce optimisation benefits can be even more impressive. Indirect benefits include collecting customer feedback from survey technology and using speech analytics to enable marketing insight. Another example would be delivering improved conversion and performance through quality, training and performance management. Indirect benefits can also be significant, though they do require additional activity to realise, and that's why they are much harder to reference in initial WFO project cost justifications.

While it may be easier to justify projects using more obvious direct benefits such as voice recording and WFM, we believe that the longer-term potential and reward is likely to be achieved by those organisations that invest in the more sophisticated areas of WFO such as performance management and analytics.

Fig 1.1 The Symbiotic WFO Process



## 3 Aligning WFO with improved Customer Engagement

Mainly based on strong operational principles, current WFO models are often presented as a single unifying process, hiding the evolving product sets that have been assembled either through development activities or serial acquisitions. Instead of looking at a single continuous WFO 'wheel' or a layered series of WFO components, at Sabio we believe it makes more sense to place a logical divide within the standard WFO framework. From working with customers across a broad range of industries, we've found that a far more pragmatic WFO approach is to split the different components into two distinct areas: Employee Optimisation and Customer Management. (Fig 1.1)

While Employee Optimisation combines all of the processes attributed to effectively managing and developing people in your operation; scheduling, resource planning, contact quality assessment and performance management, it's the Customer Management components that lead to the kind of indirect benefits that can help improve customer engagement.

Perhaps the most effective way to engage with customers is to always be listening to what they have to say – and acting accordingly. Post purchase feedback surveys may have become the norm, but organisations shouldn't necessarily have to wait until this stage to find out what customers really think. Adopting a more comprehensive Voice of the Customer approach, drawing on more in-depth analysis of the whole customer base, can help organisations gather customer and marketing intelligence that can be used to tune all aspects of the business. It's also worth developing Voice of the Agent initiatives, encouraging staff to actively shape the customer experience – rather than leaving them to deal with live issues when they occur.

## 4 Externalising customer focus with Workforce Optimisation

With speech, data and application analytics as part of their Customer Management approach, organisations can better identify market opportunities and competitive trends, while in-depth analysis can 'surface' information that might otherwise have gone undetected. While it isn't feasible to play and analyse thousands of recordings, advanced speech analytics solutions can assess these recordings for their business critical intelligence enabling marketing departments to; better understand the effectiveness of each marketing campaign, profile 'at risk' groups of customers for feeding into the retention process, identify valueless calls for automation/avoidance and identify what makes the 'good' agents 'good' and reproduce their characteristics through training.

The more successful Customer Management solutions will combine advanced speech analytics with behavioural analysis and call indexing techniques to create more meaningful, context-specific analysis activities. This could, for example, include automatically categorising calls according to specific business challenges or objectives – such as competitive threats, customer retention issues, and up-sell opportunities.

Speech analytics offers enormous potential in terms of providing timely and accurate intelligence about current business issues and how to address them.

Another key Customer Management issue for organisations is the protection of customers by evidencing compliance to regulation. While recording is traditionally considered as a simple, defensive practice – one that only has to be done to meet regulations defined by bodies such as the FCA - the increased focus on PCI-Data Security Standards and new powers available under the Data Protection Act render this subject more complex than ever, presenting risks to organisations that are simply too great to ignore.

At Sabio, we aim to integrate these types of compliance projects into an organisation's broader Customer Management approach. With one travel operator, for example, an effective compliance solution has been instrumental in reducing their overall level of compensation payments as they now always have an accurate and accessible record when contesting liability claims.

We're convinced that it will be those organisations that successfully integrate the more sophisticated WFO elements into their customer service operations that will successfully reduce Customer Effort and improve overall engagement levels.

## 5 Enabling more strategic Customer Management activities

While distinct Employee Optimisation and Customer Management activities within WFO can both deliver their benefits and provide compelling individual business cases, smart contact centre operators can unlock significant further strategic advantage when these two WFO areas are successfully brought together.

The potential operational savings released through approaches such as WFM can also play a key part in enabling organisations as they transition their WFO activities to focus on more strategic Customer Management activities such as customer feedback and speech analytics. An essential element here is to make full use of your existing WFO investments such as WFM and recording. Most contact centres record customer conversations yet many of them fail to use that valuable recorded data as a strategic resource.

Adding speech analytics and customer feedback techniques can help to address why your customers are calling your contact centre in the first place, and also then provide callers with the ability to respond immediately to the service they have just received. The advantages of such a structured feedback approach are striking – particularly as research shows that there can be a direct link between increasing an organisation's customer satisfaction index and an associated uplift in overall shareholder value.

At Sabio we're seeing solutions such as WFM playing a key role as the first stage of broader, integrated Employee Optimisation and Customer Management initiatives – and a smart choice for organisations wanting to use the savings released by effective WFM projects to fund added value Customer Management investment.

Working with Sabio, organisations such as Yorkshire Building Society, Office Depot, Leeds City Council, P&O Cruises and Cunard, Home Retail Group and Sage have all successfully secured significant savings through their Employee Optimisation and Customer Management projects.

For example, P&O Cruises and Cunard had reached the stage that it was considering replacing its entire WFM system. However, after initial consultancy with Sabio's WFO team, it was able to reconfigure its original WFM system, stabilise performance and then upgrade to the latest WFM, call recording and quality monitoring versions. Sabio's specialist WFO expertise meant that P&O Cruises and Cunard was able to shelve what would have been a six-figure WFM replacement investment.

For Home Retail Group, WFM also plays a key role in the home and general merchandise retailer's 'Contact Centre of the Future' strategy. As part of a major contact centre transformation project that is set to unlock some £4.4 million of operational savings, Sabio is deploying an extensive Verint Workforce Optimisation suite incorporating Impact 360® Workforce Management (WFM), recording, quality monitoring, as well as powerful speech analytics technology. It's estimated that Sabio's proven WFM deployment expertise will help realise a performance improvement of some £1.1 million over the next two years.

Given the results achieved by organisations like these, it's clear that Employee Optimisation has a valuable role to play. The question organisations should be asking now is whether they can afford to ignore the added opportunity presented by Customer Management initiatives.

## 6 A leading independent Workforce Optimisation specialist

Sabio is a leading independent contact centre technology specialist. Transforming customer contact, Sabio helps organisations significantly improve customer experience and reduce costs. For over 16 years Sabio has developed its unique Advanced Implementation Process ensuring the entire project life cycle is delivered efficiently and to the highest standards. Sabio also operates a dedicated hub in Singapore to support its expanding international contact centre technology design, delivery and support operations.

Sabio is distinctive in that we address all aspects of the WFO lifecycle with in-depth industry and technical knowledge. Our experience, gained through the delivery of hundreds of successful projects for organisations of all sizes - from smaller customer service centres through to deployments across 20 countries involving thousands of agents – means that your organisation can benefit immediately from our best practice workforce optimisation capabilities.

## Key Sabio strengths:

- Sabio has been a Verint Premier Partner since 2000, and is certified to deliver the latest V11 Enterprise Workforce Optimisation suite, consultancy and training via its dedicated Workforce Optimisation centre of excellence
- Award Winning - Sabio's unique combination of proven Verint expertise and in-depth Employee Optimisation and Customer Management skills ensure that the company is a multiple award winner, most recently as winner of Verint's prestigious 'Project of the Year' award for a major unified WFO project for one of the UK's leading financial services companies
- Sabio has the experience and skills to design and deliver integrated solutions that meet the specific challenges of the contact centre, from Workforce Optimisation to speech-based self-service applications to major virtualisation projects
- Sabio takes full accountability for a project by delivering an end-to-end solution using its own people and not relying on third parties to provide skills and knowledge
- Sabio has developed a comprehensive WFO modelling approach that allows businesses to find out exactly how much business value could be unlocked from an effective Employee Optimisation or Customer Management deployment
- Sabio can also offer a consolidated support contract, with the ability to genuinely offer third line end-to-end support for all elements of an Employee Optimisation or Customer Management solution from its specialist Support Centre in Glasgow
- Sabio's in-house team of 20 highly-skilled WFO support staff and specialist WFO Consulting professionals mean that the company can bring direct experience to every customer WFO scenario
- Sabio also has over 10 consecutive years' experience as an Avaya Connect Platinum Business Partner, ensuring in-depth understanding of the broader contact centre technology environment
- Sabio operates without external investment, debt or reliance on external finance – ensuring the freedom to develop its business in the best interest of customers

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