This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Decisions User Help

Staff Planning

4/25/2025

Contents

Staff Planning

To determine the effective staff (for example, staff after all shrinkage has been applied) required to achieve a target service level %, ASA, or abandon %, input the service goal target (for example, 20 seconds for ASA) in the appropriate row in the Service Quality section in the main grid. The application will display a dialog box with the staffing required in the displayed center to achieve the service goal entered.

Developing Optimal Hiring Plans

The Hiring Optimizer enables you to calculate an optimal hiring plan over a selected period of time.

The optimizer will determine the number of staff to hire, as well as the optimal dates to make hires, subject to defined hiring rules. This number is determined based on meeting requirements for a capture rate (for multi-skill contact groups), minimum service level, maximum average speed of answer, and/or maximum abandon rate.

To use the Optimizer:

1. Using the drop-down boxes on the main grid, display a center, staff, and contact type within the contact group you wish to optimize.
2. Click the **Hire** button or click **Optimize** > **Hiring Optimizer**.
3. Select the Start Date and End Date you wish to edit from the drop-down boxes at the bottom of the window. Service Goals Options:
    - Select the service goal(s) or capture rate constraints for the optimization: Capture Rate Constraints (multi-skilled contact groups only), Service Level, ASA and/or Abandon Rate.
    - Click the column header to change the sorting order from descending to ascending and vice versa.
    - Any column that has a header can be filtered. A dark blue filter icon indicates that a filter is applied while a gray filter icon depicts a filter that is not in use. Click the filter to toggle between the two. Default filters are:
        - Equals (value or text)
        - Does Not Equal (value or text)
        - Begins with… (value or text)
        - Ends with… (value or text)
        - Contains… (value or text)
        - Does Not Contain (value or text)
        - Or Custom Filter

      Hire Optimizer Email/Casework:
    - Service Level [%] and Occupancy [%] are required Goal Parameters with default values set in the Administration application when configuring Add/Edit Contact types.

  - Valid Ranges for both are decimal numbers between 0 and 100.
  - Any updates to these defaults will be saved in the scenario.

4. If applicable, click **Hire Whole FTE Only** to constrain the value to the staff as a whole integer.
5. Under the **Max Solve Time** box there are two options, **Regular Solve** and **Extended Solve**. Use **Regular Solve** unless directed otherwise by the Genesys Decisions application.
6. Using the slider control bar to the far right sets the level of importance of the constraints, somewhere on the scale from Always Meet Goal to Never Meet Goal. This control tells the optimizer how to hire or terminate staff relative to peaks and valleys in contact load. For example, if call volume for one week during the scenario requires 25% more staff to meet the target ASA goal, with the slider set at Always Meet Goal, Genesys Decisions will staff to achieve the goal in that week, and then most likely, prior and subsequent weeks will be overstaffed.
7. Use the Optimizer Parameters grid box to set:
   - Max Hire Allocation% – The maximum percentage of all the new hires or terminations that can be allocated to that particular site.
   - Min Total Agents – Minimum agents required on staff at all times for a particular Center/Staff type.
   - Max Total Agents – Maximum agents able to work at that particular Center/Staff type.
   - Min Class Size – Minimum number of agents allowed per class.
   - Max Class Size – Maximum number of agents allowed per class.
   - Max # of Classes / Week – Maximum number of classes held in a week.
   - Max Hire / Period – Maximum number of agents allowed to be hired per period.
   - Wks in period – Define how many weeks equal a period for the max hire/period.
   - Blocked Weeks Set – A user configured collection of weeks in which hiring is prohibited. To setup a Blocked Weeks Set see Blocked Weeks Set.
8. Click the **Run Optimizer** button.
   The optimizer will execute (this may take a few minutes).
9. After the optimizer is complete, check the new hires row in the main grid for each Center and Staff Type that takes the optimized contact type for your optimal new hire plan by week, and the resulting performance and financial forecast. Also, be sure to check that the service goals selected were met for these Center and Staff Types.

If you would like to see the optimal hiring plan for all sites on one screen, see Staff Planner or Reports.

> ## Important
> Executing the hiring optimizer will zero out or replace the following fields for any Center Staff Type in the contact group for the date range selected:
>
> - **New Hires**
> - **Under Time**
> - **Extra Time**

Blocked Weeks Set

Blocked weeks sets are a user configured collection of weeks in which hiring is prohibited within a scenario. Blocked weeks sets are a collection of weeks that describe which weeks to effectively block from the hiring optimizer for optimal planning. To build these blocked weeks sets use the Blocked Hiring Weeks Expert.

To create a blocked weeks set:

1. Select **Blocked Weeks Expert**.
2. Select **Create a Blocked Weeks Set**, then click **Ok**.
   The Blocked Weeks Sets window enables you to create a Blocked hiring weeks set name and then select Security settings. The settings are `Public`, `Public-Read Only`, and `Private`:
   - Select `Public` to allow full access for all users (View, Edit, Copy, Apply, Delete.)
   - Select `Public Read-Only` to allow full access for the creator. Limited access for other users (View, Copy, Apply).
   - Select `Private` to allow full access for the creator and no access for other users.
3. Edit an existing blocked week set by highlighting the blocked week set name in the list, selecting **Edit/View Existing Blocked Week Set**, and then clicking **OK**. Note that, if you edit a blocked week set, it will be changed for all Genesys Decisions users.
4. Delete an existing blocked week set by highlighting the blocked week set name in the list, selecting **Delete an Existing Blocked Weeks Set**, then clicking **OK**. Note that if you delete a blocked week set, it will be deleted for all Genesys Decisions users.
5. Copy an existing blocked week set by selecting **Copy from an Existing Blocked Weeks Set**, then highlighting the report template name in the list and clicking **Ok**.
6. Click the column header to change the sorting order from descending to ascending and vice versa.
   Any column that has a header can be filtered. A dark blue filter icon indicates that a filter is applied while a gray filter icon depicts a filter that is not in use. Click the filter to toggle between the two.
7. After typing in a name and setting permissions, click **Ok**. The blocked week set management window will appear.
8. Next, under date range, select a start date and end date for the blocked weeks set (the default is set to the length of the scenario).
9. To block a week, select the checkbox next to the date. The ability to type a note or reason in the Blocked Weeks Notes section to the right of each blocked week is available.
   To write notes about the entire set, enter your notes into the Notes section at the bottom left hand corner of the window.
10. Click **Save** to complete the week set or **Cancel** to stop any changes made.

Staff Planner

Staff Planner displays the current hiring plan as well as an staffed FTE requirement for all sites within a contact group on one screen. It provides an alternative view of the main grid and displays the Service Goals and Capture Rate constraints (multi-skilled contact groups only) for the selected contact type.

1. Click the **Staff Plan** button or click **Optimize** > **Staff Planner**.
   The **Staff Planner Settings** window displays first.
2. Select the Start Date and End Date at the bottom to edit the date range.

There are two tabs available for executing the staff planner. Service goals allows you to execute the staff planner with multiple service goals and center/staff types for multiple weeks with a maximum length of the scenario. Capture Rate Constraints (multi-skilled contact groups only) allows you to execute the staff planner for multiple capture rates with multiple date ranges and center/staff types.

Use the **IsSelected** column to enable/disable service goals that you require the staff planner to execute. At least one service goal per contact type must be selected in order to execute the staff planner.

Staff Planner Email/Casework

Note the following:

- Service Level [%] and Occupancy [%] are required Goal Parameters with default values set in the Administration application when configuring Add/Edit Contact types.
- Valid Ranges for both are decimal numbers between 0 and 100.
- Any updates to the defaults will be saved in the scenario.
- If the service level or Occupancy goals on the Main Grid do not satisfy the goals set in this window, the resulting service level goal numbers will be displayed in red.

Click the column header to change the sorting order from descending to ascending and vice versa.

Any column that has a header can also be filtered. A blue filter icon indicates a filter is applied. Default filter features are:

- Equals (value or text)
- Does Not Equal (value or text)
- Begins with… (value or text)
- Ends with… (value or text)
- Contains… (value or text)
- Does Not Contain (value or text)
- Or Custom Filter

After the values are entered, click the **Run Optimizer** button to continue.

The **Staff Plan** window opens. This provides a more detailed look at the scenario metrics/fields from the main grid that are directly associated with Staff Planning. These fields are categorized into Staffing, Requirements, and Performance.

Functionality on the **Staff Plan** window includes:

- Edit mode
- Using shortcut (right-click) menus

- Print
- Print preview
- Show/hide sections (View)
- Export:
    - HTML
    - Excel (.xls) or Text

The Outsourcer Call Allotment at the top of the screen can be used to staff accordingly using outsourced calls.

> **Important**
> Does not show up for multi-contact or multi-skill groups. You may change metrics here the same way that you would change them on the main grid.

Close the **Staff Plan** window to recalculate and return to the main grid.

Outsourcer Call Allotment

The **Outsourcer** button on the **Staff Plan** optimizer window takes you to the **Outsourcer Call Allotment** window. This module provides the optimal calls to be offered to an outsourcer to enable your internal sites to answer the rest of the calls within your service goal. You may change metrics here the same way that you would change them on the main grid.

Once in the Staff Planner window, click the **Outsourcer** button. This opens the **Outsourcer Call Allotment** window. This optimizer uses the same constraints and date range(s) executed by the staff planner.

Functionality within the Outsourcer Call Allotment module includes:

- Edit Mode
- Using Right Click Menu
- Print
- Export
    - HTML
    - Excel (.xls) or Text

Click the **Close** button in order to recalculate and return to the **Staff Plan** window.

Developing Extra Time and Under Time (Unpaid Leave) Plans

The ET/UT Optimizer calculates the required amount of Extra Time or Under Time to achieve the target Capture Rate, (for multi-skill contact groups) Service Level, ASA, and/or Abandon Rate during each scenario week. Extra Time can be modeled as a blend of additional time paid at the base wage rate and overtime paid at a premium rate (see Entering/Editing Financial Assumptions for more information). Under Time is assumed to be unpaid.

1. Using the drop-down boxes on the main grid, display a center, staff, and contact type within the contact group you wish to optimize.
2. Click the **ET/UT** button or click **Optimize** > **ET/UT Optimizer**.
3. Select the Start Date and End Date you wish to execute from the drop-down boxes.
4. Under **Optimizer Service Goals & Capture Rates** select your target, Capture Rate constraints (for multi-skill contact groups only), Service Level, ASA and/or Abandon Rate. The optimizer will allocate ET or UT to meet your service level goals using the user-configured constraints during each scenario week.
5. Click the column header to change the sorting order from descending to ascending and vice versa.

   Any column that has a header can also be filtered. A blue filter icon indicates a filter is applied.

   Default filter features are:

   - Equals (value or text)
   - Does Not Equal (value or text)
   - Begins with… (value or text)
   - Ends with… (value or text)
   - Contains… (value or text)
   - Does Not Contain (value or text)
   - Or Custom Filter

   ET/UT Optimizer Email/Casework:

   - Service Level [%] and Occupancy [%] are required Goal Parameters with default values set in the Administration application when configuring Add/Edit Contact types.
   - Valid Ranges for both are decimal numbers between 0 and 100.
   - Any updates to these defaults will be saved in the scenario.
6. Click the **Run Optimizer** button.

   A dialog box will open that reads, “This process may take several minutes & will reset all planned ET/UT to zero. Do you want to continue?” Any existing entries in the Under Time or Extra Time row of the monthly and weekly data grid will be zeroed out or replaced. Click **OK** to continue.

   The UT/ET optimizer will execute (this may take a few minutes).
7. After optimizer is complete, check the Scenario View Extra Time and Under Time rows for each Center Staff Type that handles the optimized Contact Type.

> **Important**
>
> Executing the ET/UT Optimizer will replace any values in the under time and extra time rows for any Center Staff Type in the chosen Contact Group for the date range selected.

Example: Developing a Hiring Plan

Genesys Decisions staff planning features can be used to examine the impact of alternative staff plans (for example, the plan for staff levels, hiring schedules, training period characteristics, shrinkage, and staff mix) on center performance, as well as to develop optimally-timed hiring plans to meet forecast changes in call volumes or handle times.

Situation: Use Genesys Decisions to develop an optimally-timed hiring plan that minimizes staffing, taking into account a 15% growth in expected call volume and a 5% improvement in call handle time over the next five months. In the plan, account for the benefit of an improved training program, which will shorten the training period length by one week. Plan to achieve current target levels for speed of answer and call abandon rate.

1. Open your existing scenario and save as a what-if scenario. Enter the changes in call volume and handle time by using the shortcut (right-click) menus in the Main Grid and the shortened classroom training using the **Staff Parameters** window.
2. Adjust FTE numbers (for example, planned overtime, transfers, new hires) until performance measures meet target, or use the Hiring and Termination Optimizer and ET/UT optimizer to automatically determine the optimal number of new hires and ET/UT FTE by week.
3. View your reports to compare profitability of the current staffing plan (**what-if scenario**) to alternative scenarios using the Report Comparison feature.

Example: Determining the Value of a Staff Retention Bonus

Situation: You want to lower attrition by offering a year-end bonus. You want to accurately assess the value of lowering attrition on performance measures. Additionally, you want an estimate of the increase in net profit, which should result from the reduced attrition.

1. In the Scenario View, enter the new expected attrition rates, based on the year-end bonus for the appropriate months of the scenario. The impact on performance will be calculated.
2. In the **Financials** window, account for the cost of the bonus by changing relevant cost driver assumptions.
3. Save different scenarios with new versus old attrition and cost assumptions.
4. For each scenario, check the overall impact on revenue, cost, and profitability using the reporting tool.
5. Run the Hiring/Termination Optimizer to see the reduction in required hiring, based on the new attrition rates.

Example: Determining the Value of Reducing Shrinkage

Situation: You want to evaluate the value of reducing shrinkage.

In the Scenario View, enter the new forecast shrinkage assumptions for shrinkage line items by selecting the appropriate Workgroup, and entering appropriate new assumptions in the Scenario View grid. The system will then calculate the impact of reduced shrinkage on service quality, cost, profit, and display the results. You may also change the proportion of each shrinkage line item that is paid using the **Financials** window.

Example: Forecasting Agent Occupancy

Situation: Given a current occupancy rate of 60%, you would like to know how many additional calls would be required to increase the staff occupancy to 75%.

Use the **Sensitivity Analysis** window to graph call volume versus CSR occupancy. Mouse over the graph to view the data points contained on the graph. This lets you see the number of additional calls required to get an occupancy rate of 75%. These points can also be viewed using the data tab.