GENESYS™

Workforce Management Administrator's Guide

How WFM Calculates Adherence

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Workforce Management (WFM) calculates adherence for single channel or multi-channel environments. For sites, in which there are schedule state groups configured for a single channel, WFM compares the agent's real-time state to the current schedule state. For sites, in which there are schedule state groups configured for multiple channels, WFM compares the agent's real-time state and reason code on each channel, with the scheduled states for that same channel during each specified time interval. If at least one scheduled state for that channel can be mapped to the channel real-time state, according to its adherence rules, the agent is considered adherent.

Single-Channel Adherence Calculation

Single channel agent adherence is calculated as follows:

1. WFM maps the agent's real-time state plus the reason code. If there is more than one reason code, there is more than one state + reason code mapping. If there is no reason code, WFM uses only the state for mapping. For example, if the agent has real-time state `WaitingForNextCall` with reason codes r1 and r2, for adherence purposes, WFM maps `WaitingForNextCall` + r1 and `WaitingForNextCall` + r2.

2. WFM then finds all schedule state groups that are adherent to at least one agent real-time state from step 1. A list of schedule state groups is compiled that maps to the state, based on the configuration of the schedule state groups.

3. WFM obtains all scheduled states from the current agent schedule and maps them to the schedule state groups.

4. WFM collects all schedule state groups from step 3.

5. WFM Intersects the sets of schedule state groups from steps 2 and 4. If the intersection is not empty, the agent is adherent.

Multi-Channel Adherence Calculation

Multi-channel agent adherence is calculated as follows:

1. Similar to step 1 in Single-Channel Adherence Calculation, WFM maps the agent real-time state + reason code. However, in addition to the aggregated agent state, WFM also adds separate real-time states for each channel configured on the site. (Agents can sometimes have no state on certain channels.) If reason codes are used, WFM could map multiple state + reason code pairs for each channel, plus the aggregated state.

2. Similar to step 2 in Single-Channel Adherence Calculation, WFM maps schedule state groups adherent to the aggregated state. However, in addition, WFM finds a separate set of schedule state groups for each channel. WFM considers only the schedule state groups that are specifically assigned to a particular channel for adherence with the states on that channel. WFM considers the schedule state

groups without a channel for adherence with the aggregated agent state.

3. WFM obtains all scheduled states from the current agent schedule and maps them to the schedule state groups.

4. WFM collects all schedule state groups from step 3.

5. WFM Intersects the sets of schedule state groups from steps 2 and 4 separately for each channel. If both sets are empty or the intersection is not empty, WFM considers the agent is adherent to the channel. For the aggregated agent status, WFM assumes adherence, when either the pair in step 4 is empty or step 2 and step 4 intersect. WFM considers the agent adherent, if he/she is adherent on all channels and adherent to the aggregated status.

The multi-channel algorithm also comes to a boolean conclusion; that is, the agent is either adherent or non-adherent. However, to be adherent the agent must be adherent on every channel, on which he/she is scheduled or, for which he/she receives a real-time state. Also, if the agent is scheduled on non-channel-related states, he/she must also be adherent to those states. See the example in Use Case 2: Multi-Channel Adherence.

Use Case 2: Multi-Channel Adherence
This use case is based on the schedule state group configuration in Use Case 1: Multi-Channel Adherence.

Summary	Real-time state	Scheduled states	Adherence
Agent is working on voice only, but scheduled for e-mail and voice	Agent state: `CallInbound` DN e-mail: `NotReady` DN 2323: `CallInbound`	E-mail activity, voice activity	Not adherent
Agent is working on e-mail and voice, but scheduled for e-mail only.	Agent state: `CallInbound` DN e-mail: `WaitForNextCall` DN 2323: `CallInbound`	E-mail activity	Not adherent
Agent is on a break.	Agent state: `NotReady` DN e-mail: `NotReady` DN 2323: `NotReady`	Break	Adherent

Calculation of Agent Headcount

WFM calculates the agent head count for activities in this way: If the activity belongs to a channel-related schedule state group, the agent is counted for the activity, only if the he/she is compliant with the adherence rules for that channel. Also, if an agent is non adherent overall, but adherent for a channel, the agent is added to the headcount for the activities for that channel.