GENESYS

Workforce Management Web for Supervisors Help

Schedule Bidding

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Schedule Bidding

WFM's Schedule Bidding feature enables a workforce planner to create schedules with no agent names, and then distribute those schedules to agents via the Web, so that agents can rank their most desired and least desired schedules.

Schedule Bidding enables contact centers to comply with certain labor union regulations that require that the most senior agents, or the most highly-ranked agents, get the schedules they most desire. Even if your contact center does not have these labor regulations, it may still be a process that could provide business value to you. It is a way to empower agents to have more input into the schedules they will be given, and therefore could be used to increase morale within the contact center and reward high-performing agents.

How Bidding Works

Instead of simply assigning schedules to agents, the Supervisor designs and builds a schedule scenario. Then, agents can view the scenario and enter bids for their most desired, and most unwanted, shifts. Finally, the Supervisor can auto-assign or manually assign schedules to agents based on their bids, using a hierarchy system of seniority or rank.

Click links in the summary steps below, to read details.

1: Setting Up Bidding

a. Someone with administration permissions must verify that **Schedule Bidding** is enabled. To do so, make sure that the AllowBidding configuration option is set to **true** (the default setting) in the AgentBidding section of the WFM Web application.

b. The Supervisor creates and configures a bidding scenario. Steps include creating a forecast and then a schedule for specific activities and profile agents, then deciding which agents can bid and when.

   This opens the bidding process and makes the schedule options visible to agents.

> ### Important
> During the **Schedule Bidding** period, a scenario's site has the status **Open for Bidding**. Any action or operation that would alter schedules for that site is disabled. This includes (but is not limited to) these actions: direct schedule editing, insertions or deletions, clean up or extraction from the **Master Schedule**, schedule rebuild or optimization.

2: Bidding on the Schedule

a. Agents examine the bidding scenario options and submit their bids.

b. The bidding period closes when the Bidding End Date arrives. Agents can not access the closed bidding

scenario.

3: Resolving the Bids

a. The Supervisor reviews schedule bids. The Supervisor might want to manually modify or assign schedules to agents.

b. The Supervisor starts the auto-assignment wizard. The wizard assigns schedules to agents.

c. The Supervisor reviews results of auto-assignment. The Supervisor might want to manually modify or reassign schedules.

4: Finalizing the Schedule

a. The Supervisor publishes the bidding scenario to the **Master Schedule**.

b. After all schedules have been assigned to real agents, the Supervisor can run a Schedule Bidding Report.

How the Auto-Assignment Wizard Works

It's important to understand how WFM's schedule bidding auto-assignment wizard works, otherwise, it might appear that agent rankings for granting bids is incorrect in some cases.

The wizard's algorithm makes two passes through all bids. Here's how it works:

1. The wizard first processes Desired bids only for all agents (higher ranking agents first).

2. The wizard then processes agents without assigned schedules—agents whose Desired bids were not granted or agents who have no Desired bids—taking into account Undesired bids for shifts that were not assigned previously as Desired for any agent.

Shifts in Undesired bids can be taken by agents who entered them as Desired bids. The worst case scenario occurs when an agent who has no assigned schedule finds all of his/her Desired bids granted to another agent with a higher rank who bid Desired on the same shifts, and all of his/her Undesired or neutral bids granted to other agents with a lower rank who bid Desired on those same shifts.