



Workforce What-If Tool

The Workforce What-If Tool works with full-time equivalent (FTE). Messages in the feedback area at the top of the calculator will help walk you through the use of the tool.

Note: Calculations are rounded to the nearest half-percentage, not the nearest percentage.

Forecasting metric values


To forecast metric values using the calculator:

1. Access the Workforce What-If Tool on your desktop by clicking the  button.
2. For each metric, click  to pin and type the input values. You must select at least three input values, two of which must be from the first three fields:
 - Calls: Call Volume per Call Volume Dimension (i.e., minute, half hour, hour)
 - AHT: Average Handle Time per AHT Dimension (i.e., seconds, minutes, hours)
 - Agents: Number of Agents
 - ASA: Average Speed of Answer per ASA Dimension (i.e., seconds, minutes)
 - SL: Service Level% within SL Wait Time per SL Wait Time Dimension (i.e., seconds, minutes)

Note: If a dimension is modified when there is already a value specified, the value is automatically updated to coincide with the new dimension.
3. Click Calculate.
The missing values are calculated.
The Calculate button is available when enough input values are provided to make the calculation. If any of the required or pinned values are missing, illegal (for example, negative), or problematic (for example, infinity), a message displays.

Re-running a calculation with new input values

To re-run a calculation:

1. Pin the metric () and set new values for the metrics.
2. Click Calculate.




Scenarios for the Workforce What-If Tool

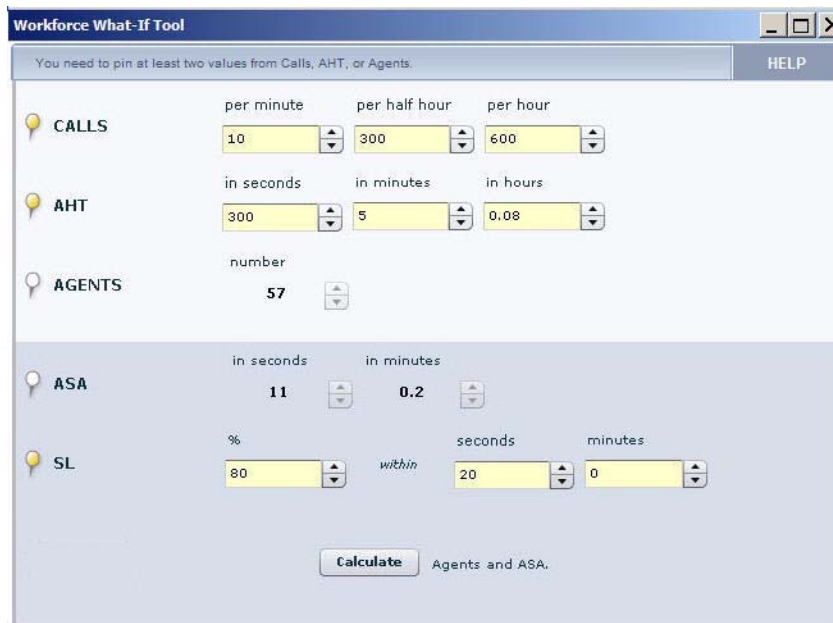
The following are some scenarios on how you can use the Workforce What-If Tool.

Scenario 1

You are expecting a typical volume of calls this morning and three people call in sick. What will that do to your service level and what should you do about it?

How many agents are required for service level at 80%?


1. Click  and set the value of CALLS to 10 per minute.
2. Click  and set the value of AHT to 300 seconds.
3. Click  and set the value of SL to 80% in 20 seconds.
4. Click Calculate.
Fifty-seven agents are required for service level at 80% (Figure 1).



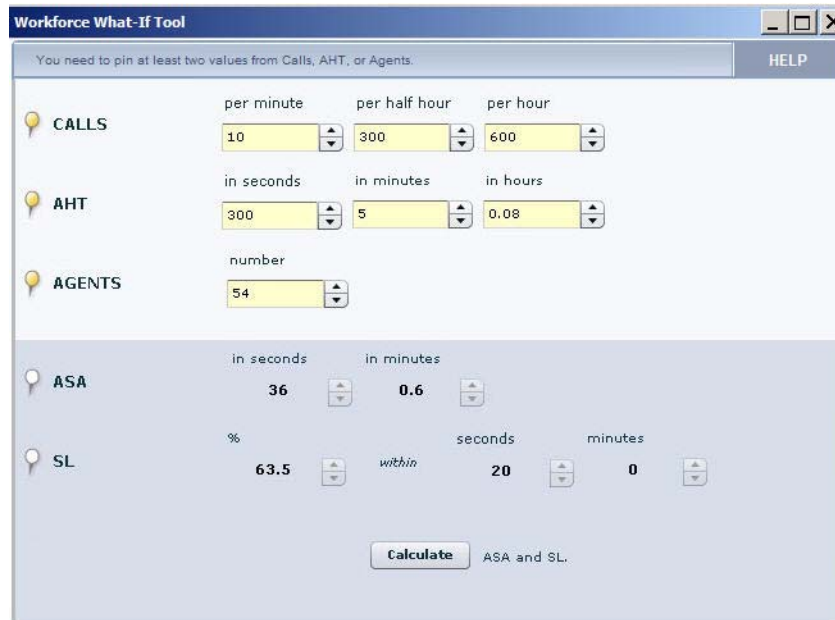
The screenshot shows the 'Workforce What-If Tool' window. At the top, a message reads: 'You need to pin at least two values from Calls, AHT, or Agents.' Below this, there are several input fields with dropdown menus for units. The 'CALLS' section has three options: 'per minute' (10), 'per half hour' (300), and 'per hour' (600). The 'AHT' section has three options: 'in seconds' (300), 'in minutes' (5), and 'in hours' (0.08). The 'AGENTS' section has a 'number' field set to 57. The 'ASA' section has two options: 'in seconds' (11) and 'in minutes' (0.2). The 'SL' section has three options: '%' (80), 'within seconds' (20), and 'minutes' (0). At the bottom, there is a 'Calculate' button with the text 'Agents and ASA.' to its right.

Figure 1: Fifty-seven agents are required for service level at 80%

What is the effect of three fewer agents on your service level?

1. Click  and change the value of AGENTS from 57 to 54.
2. Unpin SL.
3. Click Calculate.

With three fewer agents, SL% falls to 63.73%, which is unacceptable (Figure 2). You cannot allow service level to fall below 70%.




The screenshot shows the 'Workforce What-If Tool' interface. At the top, a message reads: 'You need to pin at least two values from Calls, AHT, or Agents.' Below this, there are several input fields for different metrics:

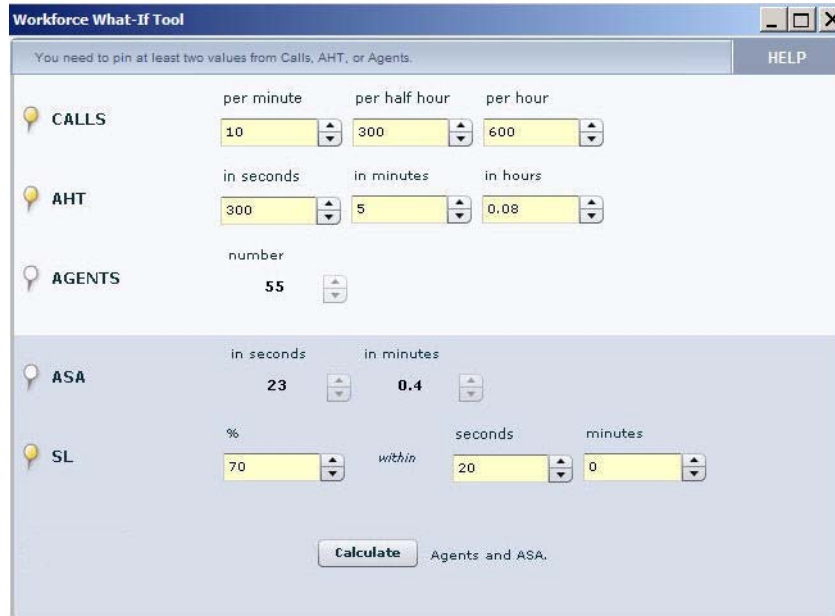
- CALLS**: Three spinners for 'per minute' (10), 'per half hour' (300), and 'per hour' (600).
- AHT**: Three spinners for 'in seconds' (300), 'in minutes' (5), and 'in hours' (0.08).
- AGENTS**: One spinner for 'number' (54).
- ASA**: Two spinners for 'in seconds' (36) and 'in minutes' (0.6).
- SL**: Three spinners for '%' (63.5), 'seconds within' (20), and 'minutes' (0).

At the bottom, there is a 'Calculate' button and the text 'ASA and SL.'.

Figure 2: With three fewer agents, SL% falls to 63.73%

How many agents would you need from other queues?

1. Unpin AGENTS.
2. Click  and change the value of SL from 63.73 to 70.
3. Click Calculate.
The number of agents changes to 55, which is acceptable (Figure 3).



The screenshot shows the 'Workforce What-If Tool' window. It contains several input fields for performance metrics:

- CALLS**: per minute (10), per half hour (300), per hour (600)
- AHT**: in seconds (300), in minutes (5), in hours (0.08)
- AGENTS**: number (55)
- ASA**: in seconds (23), in minutes (0.4)
- SL**: % (70), within seconds (20), minutes (0)

A 'Calculate' button is located at the bottom, with the text 'Agents and ASA.' next to it.

Figure 3: The number of agents changes to 55.

Action



By moving just one person from another queue, you can at least get a service level of 70%.

Scenario 2

What instructions can you give to your 55 agents to lower the average handle time which raises service level to 80% (where your incentive pay remains safe)? You may have a few places in the call flow where you can decide to forego certain steps to save time, such as inviting the caller to visit your new Web page. Generally you do them when properly staffed but this morning calls for some tweaks.

Continuing from the previous scenario...

What should the AHT be for 55 agents and a service level at 80%?

1. Unpin AHT.
2. Click  and set the value of AGENTS to 55 .
3. Click  and change the value of SL from 70 to 80.
4. Click Calculate.
AHT must be around 294 (Figure 4).



The screenshot shows the 'Workforce What-If Tool' window. At the top, a message reads: 'You need to pin at least two values from Calls, AHT, or Agents.' Below this, there are several input fields with unit labels and a 'Calculate' button.

Parameter	Unit	Value
CALLS	per minute	10
	per half hour	300
	per hour	600
AHT	in seconds	294
	in minutes	4.9
	in hours	0.08
AGENTS	number	55
ASA	in seconds	15
	in minutes	0.2
SL	%	80
	seconds	20
	minutes	0

At the bottom, there is a 'Calculate' button with the text 'AHT and ASA' next to it.

Figure 4 : AHT must be around 294.




Action

Instruct the 55 agents to skip the invitation to the Web site, just for this morning.

Scenario 3

Now it's the afternoon. Call volumes are falling off and expected to stay that way. How many people can you send home? As you let people go home, you don't want ASA to go past 30 seconds.

How many agents are required when AHT is 300 seconds and ASA is 30 seconds?

1. Click  and set the value of CALLS lower, from 10 calls per minute to 500 calls per hour.
2. Click  and change the value of AHT back to 300 seconds.
3. Unpin AGENTS.
4. Click  and set the value of ASA to 30 seconds.
5. Unpin SL.
6. Click Calculate.

The number of agents drops to 46 but service level is below 70%, which is unacceptable (Figure 5).



The screenshot shows the 'Workforce What-If Tool' window with the following settings:

Parameter	Unit	Value
CALLS	per minute	8.33
	per half hour	250
	per hour	500
AHT	in seconds	300
	in minutes	5
	in hours	0.08
AGENTS	number	46
ASA	in seconds	30
	in minutes	0.5
SL	%	69.5
	seconds	20
	minutes	0

At the bottom of the window, there is a 'Calculate' button and the text 'Agents and SL.'.

Figure 5: The number of agents drops to 46 but service level is below 70%.

What if you keep 47 agents instead of 46?

1. Leave AGENTS pinned (●) and change the value of AGENTS from 46 to 47.
2. Click Calculate.
Service level rises to 77.5%, which is acceptable (Figure 6).

The screenshot shows the 'Workforce What-If Tool' window. At the top, it says 'You need to pin at least two values from Calls, AHT, or Agents.' and has a 'HELP' button. The interface is divided into sections for different metrics:

- CALLS:** Three spinners for 'per minute' (8.33), 'per half hour' (250), and 'per hour' (500).
- AHT:** Three spinners for 'in seconds' (300), 'in minutes' (5), and 'in hours' (0.08).
- AGENTS:** One spinner for 'number' (47).
- ASA:** Two spinners for 'in seconds' (30) and 'in minutes' (0.5).
- SL:** Three spinners for '%', 'seconds', and 'minutes'. The values are 77.5, 20, and 0 respectively. The word 'within' is placed between the percentage and seconds values.

At the bottom, there is a 'Calculate' button and a note: 'SL. (Overwriting ASA)'.

Figure 6: Service level rises to 77.5%.

Action

Move the borrowed agent back to his original queue. Roll one agent off the phones each half hour, only if service level remains at 80% or higher, expecting to let up to seven agents go home (55 agents minus the borrowed agent, minus 7 more, is the 47 agents that you calculated).

Note

The Workforce What-If Tool does not account for shrinkage (this is the percentage of an FTE that accounts for time that is not productive). When you consider agent decisions using the Workforce What-If Tool, be sure to account for shrinkage using the value that is used by your company. For example, if shrinkage is 20% and the Workforce What-If Tool calculates that you need four agents, accounting for 20% shrinkage means you really need five agents (because 20% of the five agents is shrinkage, leaving the four agents you really need).