

Not everyone has the same call volume challenge as HP, but any company that ignores call volume peaks risks alienating customers. The following article from *Customer Service Newsletter*'s archives offers useful advice on call center scheduling.

— **Editor**
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Customer Service

NEWSLETTER

Call center scheduling is critical for your success: Here's what you need to know to make it easier

Leading customer service departments employ early-warning systems to respond quickly to rising call volumes, according to a report from Best Practices, LLC (www.BenchmarkingReports.com). Best Practices of Chapel Hill, North Carolina, conducts work based on the principle that organizations can chart a course to superior performance by studying top companies' best business practices, operating tactics and winning strategies.

Companies that fail to plan for call volume fluctuations risk providing inadequate service and alienating loyal consumers. In fact, call center scheduling is one of the most critical — and most difficult — tasks call center managers face.

Why scheduling is critical

The reasons are clear: Too few CSRs on the floor results in poor service. Too many CSRs on the floor results in excessive costs. According to the Best Practices report, one company in the study, using a centralized planning group, is able to forecast call volumes to within two percent.

Lasca Black, vice president of operations at Taction, says its call center operates within that parameter of efficiency, but scheduling is clearly a full-time job. Taction, formerly New England 800 Company, is a Waldoboro, Maine-based company that provides call center support to some of the country's best-known brands, including Samsonite, Chanel and McGraw-Hill. The company has 65 seats and employs 145 CSRs.

Predicting call center volumes

To predict correct CSR staffing levels, call volumes are monitored on a moment-to-moment basis and compared with historical call volume data. This is done for

each client, resulting in what Black calls "perhaps the world's biggest spreadsheet." Yet, without this data, the call center would not be able to function properly.

"We use a software program, developed in house, to aid in our scheduling. It enables us to track call volumes over every hour of the day and every day of the week." Templates are created for each client and show call volumes — and average length of call — throughout a 24-hour period. In addition, call volumes for an entire year are maintained on a client-by-client basis providing a snapshot view of call center activity. These templates are combined to show call volume levels for the entire center. This way, the company can schedule accordingly.

For example, weekly call volumes for the XYZ company show the number of calls received by week, the percent of total calls this represents for the client on a yearly basis, the average call duration and whether the center was staffed adequately to handle the call volume. The fluctuations in call volume can be used to predict future call volumes. A particular client may, for example, run a special promotion during certain weeks of the year. Call volumes are tracked — and staffed for accordingly.

Another chart shows predicted call volumes for each client as well as the center on a half-hour basis. This chart compares the forecast call volume and the actual call volume and is reviewed constantly on a 24-7 basis.

Says Black: "This lets us know immediately if call volumes are exceeding our forecast. If so, we can react quickly to increase CSR staffing."

What makes the challenge at Taction so demanding is that each client has different call volume levels and different levels of service requirements. The scheduling

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problem is somewhat less daunting in company call centers where CSRs are only responsible for that company's products.

Data required

According to Black, proper scheduling requires, at a minimum, these pieces of data:

1. Historical data of calls received on a weekly basis.
2. Data on calls received on an hourly basis for each day of the week. She notes that in her call center, as well as in other centers she's familiar with, call volumes are heaviest on Mondays and gradually decline during the week.
3. Marketing data, such as when a newspaper ad will appear or a catalog will be mailed. These events will increase demand on the call center.
4. The average length of a typical call. This lets you determine how many calls a CSR can handle each hour.

A look at the math

While this is a simplified example, it serves to highlight the basics of call center scheduling. With the above data in front of you, you can forecast your CSR needs on a daily and hourly basis. You may find that your center receives an average of 1,000 calls on Monday, but 500 of these calls are received between the hours of 11 a.m. and 2 p.m. If your average length of call is five minutes, you'll need a minimum of 14 CSRs to handle the workload during that three-hour period. (Average number of calls received per hour is approximately 166. At five minutes per call, each agent can handle 12 calls per hour. Dividing 166 calls by 12 equals approximately 14 — the number of CSRs required to handle the workload.)

Be aware of changes in call volume

It's easy to see that if your call volume predictions are inaccurate, your staffing decision will be inaccurate as well. This is why it is so critical to track call volume on a real-time basis.

Staffing at Taction

At Taction, CSR work shifts start every hour of the day to accommodate fluctuating call center volume. At 5 a.m., for example, few CSRs are needed to handle the load. As the day progresses, and call volume rises, additional CSRs report for work.

But even the best scheduling won't help if CSRs don't show up

Even if you can predict call volumes to within two percentage points, it won't do any good if your CSRs don't show up on time.

"To make a call center work efficiently — and cost effectively — you not only need to forecast call volumes accurately, you need to have CSRs who are dependable," says Lasca Black, vice president of operations at Taction.

Her scheduling also takes into account the average number of CSRs who are likely to be absent on a given day and she staffs accordingly.

CSRs are grouped into six teams and to encourage attendance, a team of the month and a CSR of the month are recognized. The criteria for recognition is based heavily on attendance. "Team members put peer pressure on other members of the group to encourage attendance," she says.

In addition, CSRs are given the opportunity to go home early if call volumes warrant. (See main story above.) Often an emergency will arise that a CSR needs to take care of, she points out. By letting CSRs leave early, they are encouraged to show up for their shift instead of calling in sick for the day. This lets Taction staff correctly for predicted call volumes — and lets the company accommodate CSR needs as well.

If call volumes require the attendance of a CSR who needs to leave, the CSR is permitted to call another CSR at home to arrange a possible shift change.

"We try to be as flexible as possible," Black says, "but of course adequate staffing comes first. However our policies are designed to be accommodating."

Source: Lasca Black, vice president of operations, Taction, 251 Jefferson Street, Waldoboro, ME 04572; phone: (800) 225-5669.

Says Black, "Flexible scheduling enables us to staff according to need and is seen as a perk for our agents, many of whom are mothers with small children to care for. Others are college students who prefer to work during the evening. Being able to accommodate the schedules of our agents makes our center a desirable place to work."

When things don't go as planned

Forecasts can sometime go awry, Black says. "If a client neglects to tell us they're putting a catalog in the mail, for example, we can be flooded with unex-

pected calls. This is why we track call volume on a half-hour basis throughout the day. This way, we get an instant warning that we need to call in additional CSRs.”

Many of the agents that work at Taction live within walking distance of the center and are told they may occasionally be needed on an emergency basis. In addition, all managers and supervisors are trained to handle the phones to provide coverage until additional CSRs arrive.

When an aberration occurs, the client is contacted so Taction can learn what the client did differently to cause the spike in calls and adjust forecasts accordingly.

The other side of the coin

Call volume spikes are just one side of the coin: It can happen that call volumes are below expectations, which results in an overstaffing situation.

“If we have five CSRs sitting around with nothing to do, this can have a significant impact on our profitability,” says Black.

Taction has a solution: a “go home early” list. CSRs sometimes need to leave early. If so, they put their names on the go home early list. If call volume

is not as high as forecast, CSRs on the list are permitted to leave. “This helps us keep our staffing at an optimum level,” says Black. “And that helps make us more efficient as well as more profitable.”

Is there a software solution?

While there are some workforce management programs available, Black says, they were unsuitable for Taction’s needs. “The programs we looked at couldn’t handle multiple clients. That’s why Taction turned to its in-house technical staff. The final product works very well and is constantly being improved.” In fact, Black adds, Taction has given some thought to marketing its software scheduling solution, “but that’s down the road.”

In-house call centers may be able to find a suitable software program to help in scheduling. But, Black warns, be sure the programs you consider will do the job you need to have done. You need to be able to capture and analyze call volume data on a real-time basis for it to have real value.

Sources: Best Practices, LLC, 6320 Quadrangle Drive, Suite 200, Chapel Hill, NC 27514; phone: (919) 403-0251; website: www.BenchmarkingReports.com. Lasca Black, vice president of operations, Taction, 251 Jefferson Street, Waldoboro, ME 04572; phone: (800) 225-5669. ■

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28 West 25th Street — 8th Floor • New York, NY 10010-2705

Telephone: (212) 228-0246 • Fax: (212) 228-0376 • Email: info@CustomerServiceGroup.com • Website: www.CustomerServiceGroup.com

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