



# WORKFORCE MANAGEMENT

## NICE IEX WFM

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*Workforce Optimization, Marketing*

*August 6, 2013*

# AGENDA

INTRO

VALUE PROP

DELIVERY MODEL

BACK OFFICE

PERFORMANCE MANAGER

QUESTIONS

THERE IS  
**NO WFM  
EASY BUTTON.**



Your operation changes  
constantly. Your people  
have multiple skills.  
Demand ebbs and flows.



# NICE IEX WFM is the Best Solution

## Configurability

Multi-skill

Multi-site

Multi-methodology

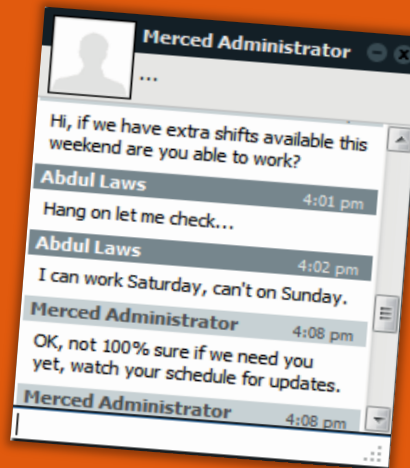


## Engagement

WebStation portal

Schedule ownership

Collaboration



## Delivery

5/5 Customer Sat

5/5 Services

5/5 Responsiveness



# NICE IEX WFM Attracts Fanatical WFM Pros

Large, iconic brands. Complex environments. Demand for new solutions.

**NICE IEX WFM v6 includes >100 features requested by customers**

Entity sets for greater intraday visibility

Personalized desktop displays

Date-specific agent data

Entity parameters copying capability

Queue based contact history

Graphical, web-based reporting



# NICE IEX WFM Customers

Partial List

## Financial Services



## Telecommunications



## Insurance / Healthcare



## Outsourcers



## Hospital / Travel



## Retail / Catalog Sales



## Technology



## Energy / Utilities

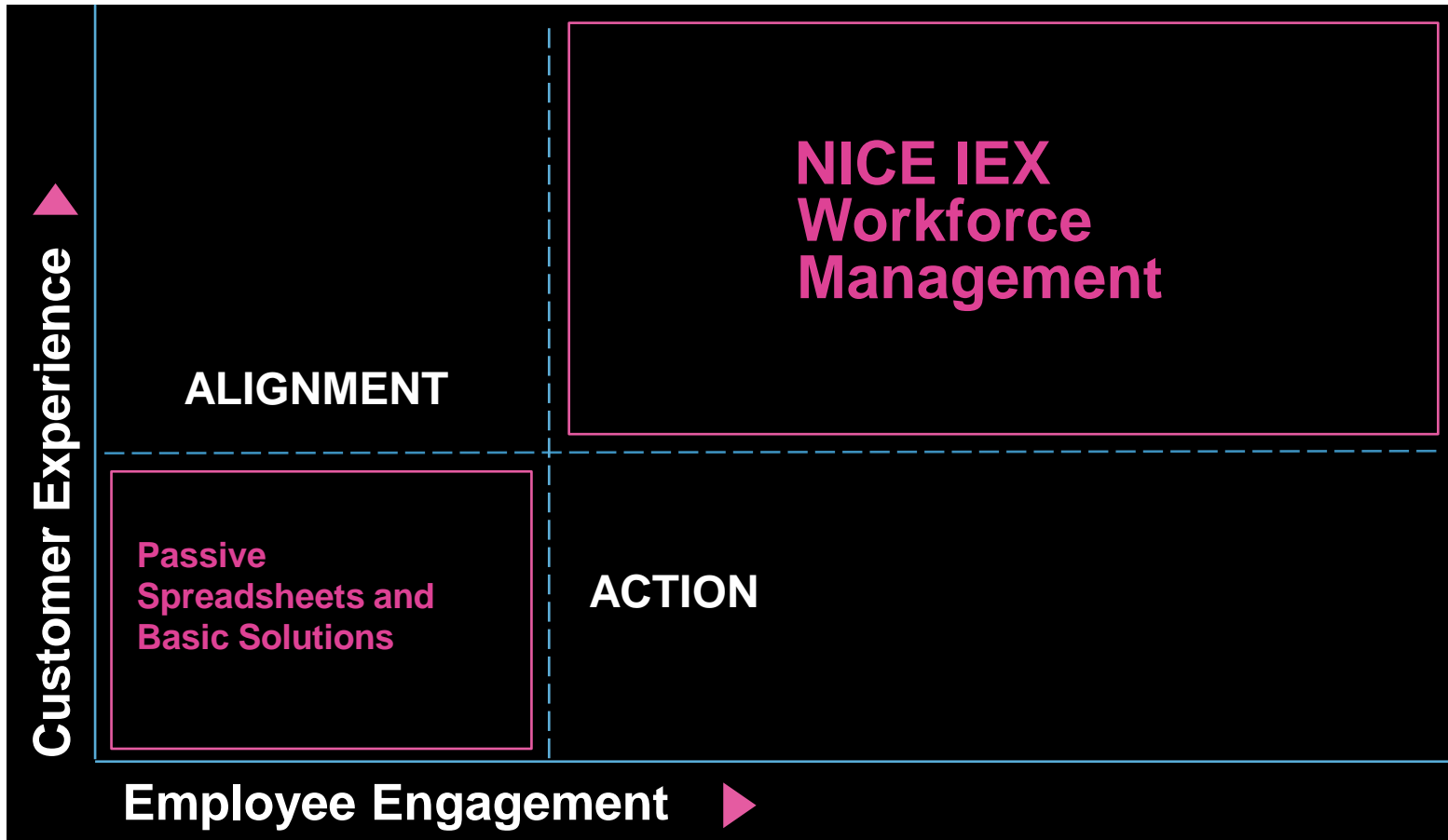


## Others



# BUSINESS VALUE OF IEX WFM

# Business Value of NICE IEX WFM





# ALIGNMENT

Multi-skill Simulation = Forecasts Aligned to Demand

## FORECAST WITH UNMATCHED PRECISION:

MULTIPLE Agent Skills

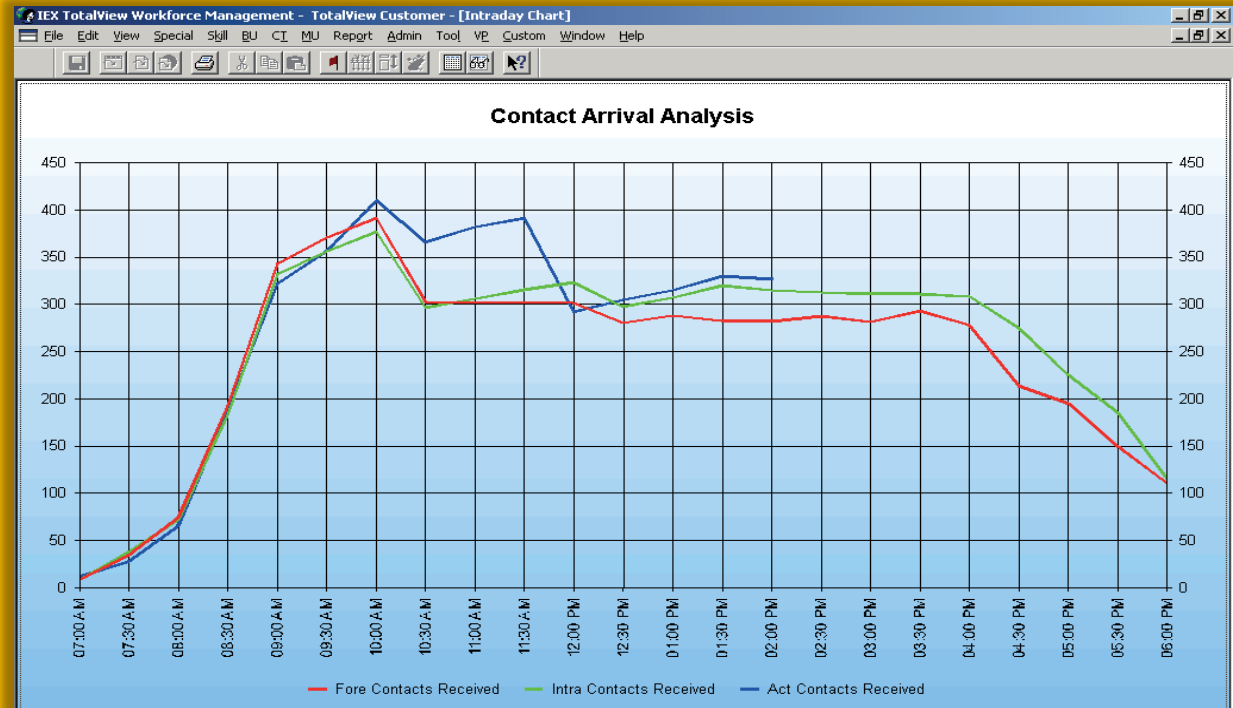
EXACT Skill Levels

EXACT Routing

EXACT Schedules

ALGORITHMS for

Service & Back Office



# ALIGNMENT

Configure the solution for your specific environment

## Multi - Site

Span contact center,  
branch and back office

Forecast from any site

Weighted Targets

Cross-Site Groupings

## Multi - Channel

Forecast based on  
inbound and outbound

Shift resources between  
channels to meet demand

## Multi - Methodology

Shift Bidding

Variable or Rotating

Seniority or Ranking

Availability Points

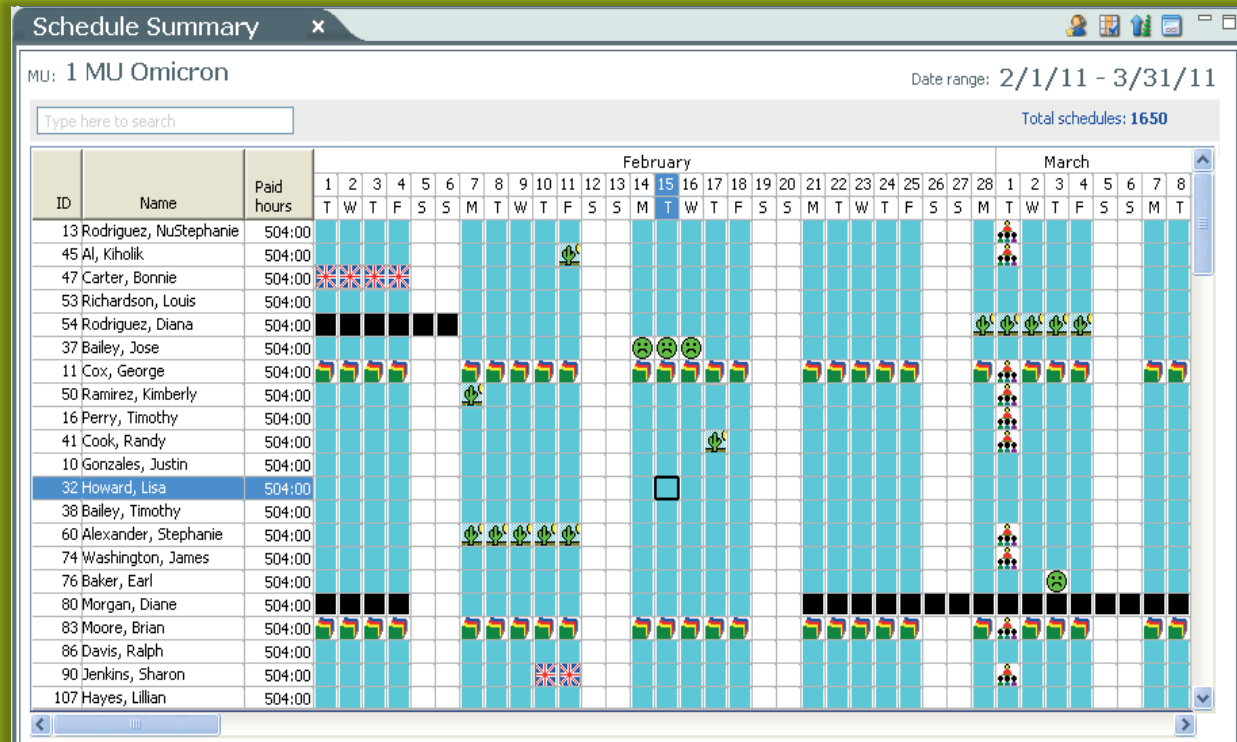


# ACTION

## Intraday Change Management

### Manage Change as it Happens:

- Real-Time Adherence
- Intraday Charting
- Desktop Activity Monitoring
- Drag and Drop Schedule Modification
- Automatic Intraday Reforecasting



# ACTION

## Engage Employees to Drive Accountability

### Time Off Manager

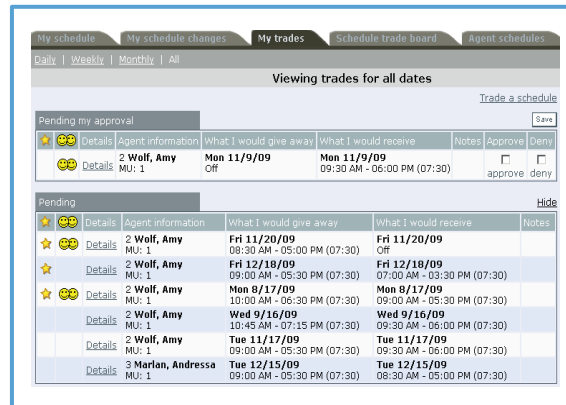
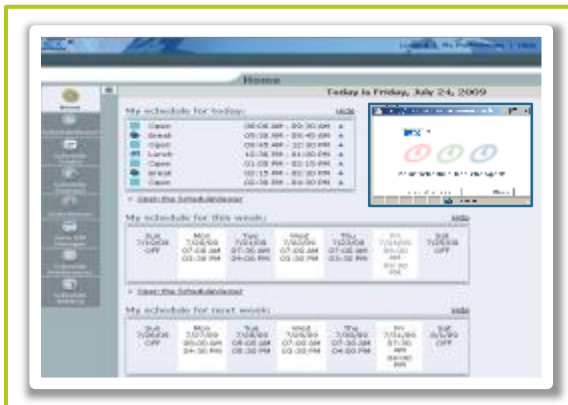
- Simplify Vacation Planning
- Calculate Vacation Accrual
- Configure Bid Rules

### Webstation

- Total Schedule Visibility
- Alerts and Notifications of Shift Changes
- One portal for all WFM and performance data

### Availability Points

- Meet service requirements
- Set points quotas
- Employees optimize mix
- Ideal for remote workers



# Key Differentiators

## Customer Experience

- Multi-Skill simulation
- Multi-site, multi-method
- Precision forecasting
- Configurable reporting

**Configurability for  
WFM Professionals**

## Employee Engagement

- Webstation = Ownership
- Change Management
- Points and Shift Bidding
- Collaboration

**Simplicity to Engage  
WFM Users**

Save (up to) millions. **WFM IS ELEVATED.**

# DELIVERY

# Services

**CSAT with Services is a critical area of differentiation for NICE in the WFM market**

## Services & Support

Benefit both from NICE's technical experts and from our highly engaged user community

## On-site, Hand-holding

NICE doesn't send you links to computer training and leave you hanging. We train you on-site, in-person to ensure value

## CSAT

We are proud that our investment in services is represented in perfect 5.0 CSAT scores in DMG's WFM industry report



# Delivery Models

## On Premise

CUSTOMER



Perpetual License  
Software Maintenance  
IT Management Costs

## Managed Service

NICE®



Perpetual License  
Software Maintenance  
Monthly Hosting Fee

## SaaS



Subscription License  
Maintenance Included  
Management Included  
One-Time Set-up



**NICE IEX WFM  
IN BACK OFFICE**

# Workforce Management in the Back Office

## Back Office Systems

Claims

Email

Loans

Imaging

Billing

Chat

Real-Time  
Desktop Activity  
Monitoring



## Performance Reports



## Real-Time Adherence



Forecasting &  
Intraday Management

# Same Core Benefits as Contact Center

1

## **Increase Forecast Accuracy**

- Multi-skill simulation for precision
- Workload forecasting calculates resources for 'delayed response' environments

2

## **Automate Staff Planning**

- Schedule rules accommodate any method
- Skill block scheduling optimizes task-switching
- Empower employees to manage schedules

3

## **Manage Intraday Change**

- Gauge impact of add'l volume on backlogs
- Real-time and historical adherence
- Drag and drop resources to address issues

# Back Office-Specific WFM Benefits

1

## Manage Work Inventory

- Project future work inventory and backlogs
- Ensure compliance with SLAs to avoid penalties and interest payments

2

## Share Work With Call Center

- Support easy-to-handle call types
- Route back office work to call center in lowest volume hours

3

## Complete Productivity Picture

- Utilization =  $\text{Earned time} / \text{Total schedule time}$
- Productivity =  $\text{Earned time} / \text{Scheduled productive time}$
- Proficiency =  $\text{Earned time} / \text{Actual productive time (RTAM)}$

# PERFORMANCE MANAGER MODULE

# The Challenges of Performance Reporting

WFM Professionals regularly face three major obstacles to engaging employees and clarifying accountability for performance

## Manual Reporting

Reliance on Excel to communicate adherence, compliance, and other metrics

## Frontline Visibility

Metrics are not clearly or effectively cascaded to frontline employees

## Enabling Coaches

Coaches cannot identify the employees and/or metrics that need the most attention



# Enter NICE Performance Manager Module

NICE PMM is built to work with IEX WFM out of the box—amplifying your investment

## Automatic Reporting

Dashboards cover WFM, QM and 3rd party data. Automatic alerts, messages and tasks

## Role-Based KPIs

Clear goals and performance measures (based on best practices) at the individual level

## Coaching Workflows

ID employees and metrics that need coaching. Track impact and assess efficacy



**ALIGNMENT**

**ACTION**

# How NICE PMM Works

## DATA IN

### Standard Connectors

NICE IEX WFM

NIM & QM

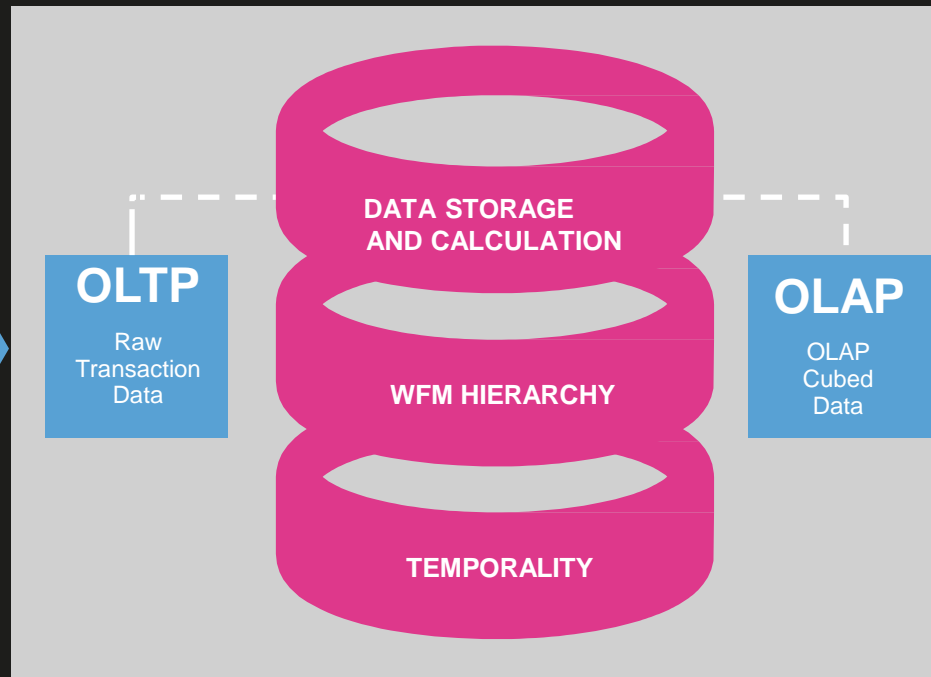
SSDI:

Sales

CRM

CSAT

Up to 20 Metrics



## INFO OUT

### Out-of-Box Reporting

Dashboards

Alerts, Tasks  
and Messages

Goal Management

Coaching Efficacy  
Monitoring





# Roles-based KPIs, Goals, Reports, Dashboards

The dashboard interface includes a top navigation bar with tabs for Home, Inbox, and Coaching. Below this is a sub-navigation bar with links to Performance Details, Employee Coaching, Weekly Plan, Employee Recognition, and User Tools.

**My Alerts, Messages, and Tasks**

Alerts	Messages	Open Tasks	Overdue Tasks
3	0	1	1

**Recent Team Performance - Yesterday**

	AHT	Adherence	Conformance	Quality	Revenue Per Call
Dennis Kraft	868 ✓	98% ✓	103% ✓	- -	\$19.12 ✗
Francine Orlando	747 ✓	94% ✓	100% ✓	- -	\$20.00 ✓
Jack Brentwood	1,540 ✗	88% ✗	100% ✓	95.00% ✓	\$20.00 ✓
Katherine Jameson	1,262 ✗	89% ✓	101% ✓	94.00% ✓	\$25.00 ✓
Kolby Vandenberg	747 ✓	90% ✓	99% ✓	- -	\$20.29 ✓
Marianne Sogard	869 ✓	84% ✗	100% ✓	82.00% ✗	\$20.00 ✓
Sarah Duard	868 ✓	98% ✓	100% ✓	- -	\$20.00 ✓
Sherry Granderson	747 ✓	94% ✓	101% ✓	74.00% ✗	\$25.00 ✓
Sydney Lite	1,318 ✗	60% ✗	95% ✗	- -	\$20.29 ✓

**Recent Team Performance - Last 7 Days**

	AHT	Adherence	Conformance	Quality	Revenue
Apr 7	- -	- -	- -	- -	- -
Apr 8	- -	- -	- -	- -	- -
Apr 9	776 ✓	87% ✗	99% ✓	- -	\$20.8
Apr 10	803 ✓	88% ✗	97% ✗	- -	\$33.9
Apr 11	930 ✗	81% ✗	97% ✗	95.00% ✓	\$24.4
Apr 12	772 ✓	84% ✗	100% ✓	- -	\$33.9
Apr 13	935 ✗	85% ✗	100% ✓	86.25% ✗	\$20.6

**Quick Links:**

- My Agents' KPI Trends
- Contact Productivity Details
- Quality Details
- Actual vs. Schedule Time by Schedule Attribute
- My Team's KPI Trends
- Contact Productivity Details By Queue
- Adherence Details
- WFM Performance & Staffing

Automated alerts put critical performance data front and center for your supervisors

Choose from over 200 out-of-box metrics and report at individual level

Quick link to WFM, ACD and Quality reports and dashboards

# Coaching Form and Effectiveness Monitoring

The screenshot displays the NICE Coaching Form interface. At the top, there is a navigation bar with tabs for Home, Inbox, and Coaching. Below this, a sub-navigation bar includes links for Performance Details, Employee Coaching, Weekly Plan, Employee Recognition, and User Tools. The main content area is titled 'Document Coaching Session' and includes a 'Required Field' indicator. The form is divided into several sections: 'General Session Information' with fields for Employee Name (Blessy Mane) and Date (Jul 2, 2012); 'Session Focus' with a dropdown for Coaching Topic (Adherence is selected); 'Feedback' with sections for Strengths, Opportunities, and Summary; and 'Employee Follow-up Tasks' with an 'Add...' button and a task entry field. Arrows from the text boxes on the right point to the Coaching Topic dropdown, the Feedback text areas, and the Follow-up Tasks section.

**NICE**

Home Inbox Coaching

Performance Details - Employee Coaching - Weekly Plan - Employee Recognition - User Tools -

> Home > Document Coaching Session

**Document Coaching Session**

\* Required Field

General Session Information ⓘ

Employee Name: \* Blessy Mane

Date: \* Jul 2 2012

Session Focus ⓘ

Coaching Topic: \*

- Sales
- Adherence
- Quality
- Call Efficiency
- Attendance
- Customer Skills

Feedback ⓘ

Strengths:

Blessy is a very talented agent and handles difficult customers with great sensitivity (see recognition form sent on June 22). (1674 characters left)

Opportunities:

To ensure there is proper coverage on the phones, it is critical that Blessy stick to her scheduled breaks. (1693 characters left)

Summary: \*

Blessy does an excellent job on the phones and needs to extend this excellence to being mindful of her scheduled breaks. (1693 characters left)

Employee Follow-up Tasks ⓘ

Click "Add..." to assign Task

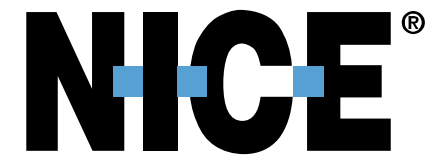
Add ...

Summary: \* Blessy to review company Schedule Adherence Po

Coaching closes the loop on improving agent performance

Coaching without action is merely advice. Assign specific actions to be taken to change behavior





THANK YOU