WORKFORCE MANAGEMENT

NICE IEX WFM

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Workforce Optimization, Marketing

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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 is the Best Solution.
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
- Bank of America
- CHASE
- Discover
- Fidelity
- Morgan Stanley
- Western Union
- GE
- SunTrust
- GE Money Worldwide
- CUNA Mutual Group
- AP

Telecommunications
- AT&T
- Qwest
- Sprint
- Verizon Wireless
- Embarq
- Bell
- Vodafone
- Reliance
- Telstra

Insurance / Healthcare
- Cigna
- Liberty Mutual
- Medco
- USAA
- McKesson
- Nationwide
- CVS
- Caremark

Outsourcers
- Convergys
- Sitel
- Accenture
- Minacs
- Wipro
- Teleperformance
- TechTeam

Hospital / Travel
- Avis
- Air Canada
- Carlson Wagonlit Travel
- Marriott
- Radisson Hotels & Resorts
- Orbitz
- American Express
- Enterprise
- Greyhound

Retail / Catalog Sales
- OfficeMax
- Barnes & Noble
- Overstock.com
- IKEA
- Neiman Marcus
- Target
- L.L. Bean
- Netflix
- Tupperware

Technology
- IBM
- DIRECTV
- OnStar
- Linksys
- Lenovo
- Canon
- Southern Company
- National Grid

Energy / Utilities
- TXU Energy
- AEP American Electric Power
- Shell
- Enery
- Entergy
- Southern Company
- Black Hills Energy
- CPS Energy

Others
- UPS
- AAA
- Monster
- PB
d
- PODS
- MAERSK
- Iron Mountain
- AVAYA
- Seagate
- Advanced Simplicity
- The Power of Action
- Sure We Can
- Black Hills Energy
- PODS
- Mobility On Demand Solutions
- Carlson Marketing

6
BUSINESS VALUE OF IEX WFM
Business Value of NICE IEX WFM

NICE IEX Workforce Management

ALIGNMENT

Passive Spreadsheets and Basic Solutions

ACTION

Employee Engagement

Customer Experience
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

Contact Arrival Analysis

- Fore Contacts Received
- Init Contacts Received
- Act Contacts Received
## ALIGNMENT
Configure the solution for your specific environment

<table>
<thead>
<tr>
<th>Multi - Site</th>
<th>Multi - Channel</th>
<th>Multi - Methodology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Span contact center, branch and back office</td>
<td>Forecast based on inbound and outbound</td>
<td>Shift Bidding</td>
</tr>
<tr>
<td>Forecast from any site</td>
<td>Shift resources between channels to meet demand</td>
<td>Variable or Rotating</td>
</tr>
<tr>
<td>Weighted Targets</td>
<td></td>
<td>Seniority or Ranking</td>
</tr>
<tr>
<td>Cross-Site Groupings</td>
<td></td>
<td>Availability Points</td>
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</tbody>
</table>

### 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
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

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

Configurability for WFM Professionals

Simplicity to Engage WFM Users

Save (up to) millions. **WFM IS ELEVATED.**
DELIVERY
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**
- Perpetual License
- Software Maintenance
- IT Management Costs

**Managed Service**
- 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

<table>
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<tr>
<th>Number</th>
<th>Process</th>
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<tbody>
<tr>
<td>1</td>
<td>Manage Work Inventory</td>
<td>• Project future work inventory and backlogs&lt;br&gt;• Ensure compliance with SLAs to avoid penalties and interest payments</td>
</tr>
<tr>
<td>2</td>
<td>Share Work With Call Center</td>
<td>• Support easy-to-handle call types&lt;br&gt;• Route back office work to call center in lowest volume hours</td>
</tr>
<tr>
<td>3</td>
<td>Complete Productivity Picture</td>
<td>• Utilization = Earned time / Total schedule time&lt;br&gt;• Productivity = Earned time / Scheduled productive time&lt;br&gt;• Proficiency = Earned time / Actual productive time (RTAM)</td>
</tr>
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</table>
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

**OLTP**
- Raw Transaction Data

**OLAP**
- OLAP Cubed Data

**WFM HIERARCHY**

**DATA STORAGE AND CALCULATION**

**TEMPORALITY**
Roles-based KPIs, Goals, Reports, Dashboards

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

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