



# **NICE IEX WORKFORCE MANAGEMENT FOR BACK OFFICE**

Solution Overview

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For more than two decades, NICE IEX Workforce Management (WFM) has led the market in product innovation by offering the most complete and configurable solution on the market, attracting the world's largest community of exacting WFM professionals. NICE IEX WFM is a proven solution that helps engage employees across an organization. Our back office customers describe the value of WFM across three dimensions:

## 1. Forecasting and Capacity Planning

WFM for Back Office allows customers to forecast work volume more accurately through proven algorithms that automatically ignore data outliers. Forecasts detail when work volume will be received and when it should be handled to ensure service levels are met. Capacity planning tools allow customers to create a capacity plan for handling the various types of back office work. Accurate forecasts and efficient capacity plans lower costs and increase customer satisfaction.

## 2. Resource Allocation and Scheduling for Reduced Staffing Costs

Flexible scheduling tools support virtually any scheduling environment, including single and multi-skill employees and single and multiple site organizations. WFM helps customers optimize resource allocation to specific work types based on work volumes. Enterprise customers can optimize task assignments for workers who switch between contact center and back office processing activities. This optimization supports greater workforce flexibility and lowers the cost of transactions.

## 3. Employee Productivity and Empowerment

WFM gives managers visibility into the actual work time and productivity of their employees on a daily basis. Workers also appreciate having this insight, as well as the ability to self-manage schedule changes, trades and time-off requests. This solution allows companies to reduce costs by automating manual forecasting tasks. It also allows companies to delegate to employees many of the administrative tasks normally managed by supervisors.

While WFM can operate as a standalone solution, it is also a foundational component of NICE's broader Workforce Optimization platform. This document defines the two NICE IEX WFM SKUs and then describes the component features of the NICE IEX WFM line-up.

## DESCRIPTION OF NICE IEX WFM FOR BACK OFFICE SKUS

### NICE IEX WFM Essentials for Back Office

WFM Essentials defines the foundation of the solution. It offers the WFM professional all the control and configurability to tailor the solution to their specific environment. Essentials has the unique ability to simulate forecasts and schedules for a multi-skilled workforce across multiple sites and scheduling methodologies. The solution includes all the reporting fidelity and system control required to deliver precision forecasts, and adjusts to meet changing business needs.

### NICE IEX WFM Advanced for Back Office

Engage your employees with WFM Advanced. It includes all the components needed to connect workers throughout an organization to WFM data and instills accountability and ownership of schedules. WebStation is an Advanced WFM feature that serves as a central portal for all data: scheduling, time-off requests, and even performance. Additionally, new collaboration tools (such as, blogs, wikis, chats, and polls) make it easy for employees to share ideas and best practices.



## NICE IEX WORKFORCE MANAGEMENT COMPONENTS

Included in NICE IEX WFM Essentials and NICE IEX WFM Advanced:

### Forecaster

Powered by patented forecasting algorithms, Forecaster provides precision projections of transaction volumes, average handle times, and employee requirements. The impact of missing data or outlier days is automatically constrained, saving time on manual discovery and change, and ensuring that statistical anomalies do not derail future planning. In addition to meeting near-term weekly needs, Forecaster can make projections up to five years in advance in daily, weekly, or monthly views.

### Planner

Easily handle the task of planning work allocations and converting transactional forecasts into headcount and hiring plans. Algorithms account for headcount variation, but also Average Handle Time (AHT) differences, work rule differences, and pre-planned events within and between work groups. The solution then develops staffing plans to ensure you achieve service level objectives for each type of work. Take a long term perspective and create hiring plans with new-hire lead time projections and daily, weekly, and monthly cost analysis.

### Scheduler

All of an enterprise's work rules, planned activities, known absences and employee constraints are automatically accounted for with WFM Scheduler. This feature designs the optimal workforce schedule for each interval of each operational day. Scheduler offers two systems to accommodate employee schedule choice in back offices with part-time and flexible staffing. The Preference-Based Scheduling mode uses seniority or performance rank to match forecasted staff requirements with work rules defined by employee choices and supervisor guidance. The Schedule Bidding mode creates schedules without immediately assigning employees. In seniority or performance rank order, employees may select the schedule they prefer.

### Historical Adherence

Produce comprehensive adherence and conformance reports from archived employee activity records. These reports can help employees and supervisors detect and correct patterns of adherence compliance problems by comparing scheduled activities with actual activities over a long period of time.

### Real-Time Adherence

Monitor employee schedule adherence, as well as time-in-state adherence. The Real-Time Adherence approach compares an employee's schedule against the employee's present status to determine if an infraction exists. When differences are detected, employee names are automatically sorted and highlighted on the Real-Time Adherence screen, alerting a supervisor to potential issues and enabling them to guide the employee. NICE Real-Time Activity Monitoring provides the real-time data feed to WFM to enable Real-Time Adherence in the back office.



## Change Manager

NICE IEX WFM includes patented features that allow you to streamline adjustments to staffing to meet changing demands throughout the day and week. The Change Manager feature identifies gaps and helps you take corrective action—such as, drag and dropping personnel from one activity to another to plow through a queue or backlog. After which, results can be monitored; the solution reforecasts transactions, handle time, workforce requirements and backlogs automatically throughout the day and the week.

## Multi-Skill

The most complete solution for multi-skill environments is WFM's patented scheduling process. It simulates the routing of multiple work types through an enterprise's environment based on the specified skills of each employee pool. The system automatically schedules the appropriate amount of time for each type of work. Multi-skill also provides the scheduling solution for the unique challenges of blended environments.

## Multi-Site

Using Multi-Site lets managers view activity data from all locations on a single screen, allowing easy changes to forecasts and work allocations between sites. Staffing requirements can be evaluated at the enterprise level as well as the individual site level, ensuring full visibility and accountability. Multi-site allocates work using future employee availability, providing a greater degree of resource allocation accuracy. Multi-site uses a single server and single database, so workforce managers can spend more time refining forecasts to match key performance indicators, and less time worrying about data consolidation and change monitoring.

## Express Messenger

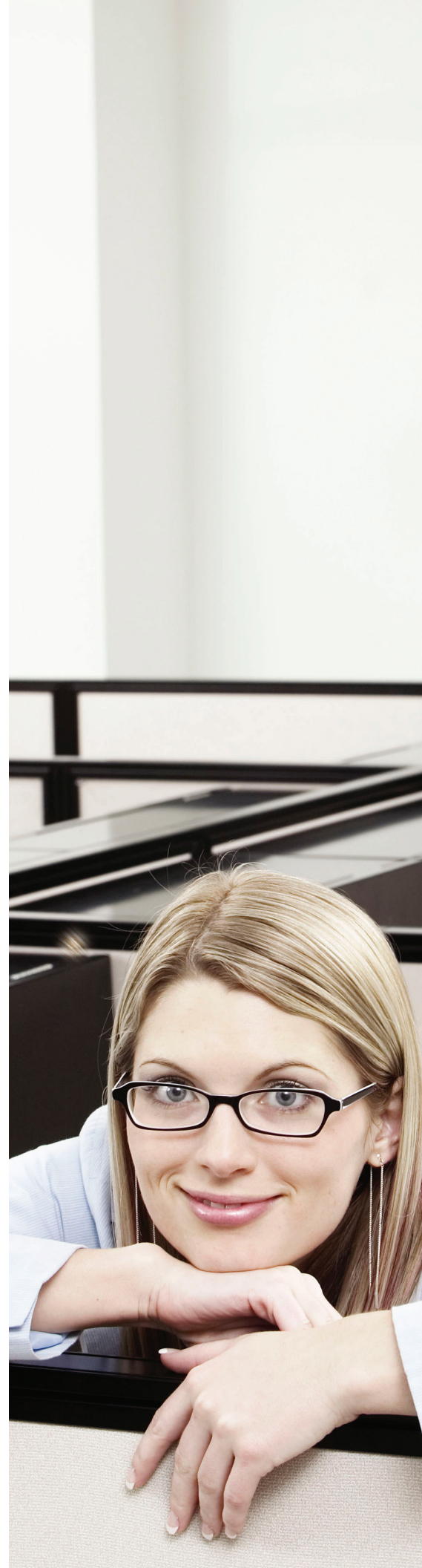
Automatically communicate schedules and schedule updates to employees and their supervisors via email to their office, home or phone. You no longer have to wait for employees to be in the office – proactive communication can help you stay ahead of the change curve.

## Administrator

WFM professionals demand a system that is flexible and easy-to-use. Administrator allows for a single client workstation to serve as the control point for all workforce management functions, including configuration, data viewing and editing, reports, forecasts, schedules, and performance scorecards. This Windows-based interface makes administering the WFM system simple and accessible from any location touching the client's network.

## Report Manager

Configurable tabular and graphical reports are available to the entire organization via a web browser. All employees can see where they stand versus targets and versus their peers. Analysts and WFM Professionals can dive into data to understand near-term issues and longer-term trends. Additionally, decision-makers always have tremendous depth and breadth of insight into operations. Report manager allows reports to be exported in several formats including PDF, RTF and XLS.



## INCLUDED IN NICE IEX WFM ADVANCED

The advanced solutions included with WFM Advanced emphasize employee engagement—driving accountability and collaboration.

### WebStation

This is the central nervous system connecting your people and processes. WebStation is a web-based interface that presents WFM information to supervisors and employees. It's where they find their schedule, request time off, interact with peers and more.

### Employees

Employees can view their schedules, receive alerts of schedule changes and event reminders, and see which shifts need to be filled. They can also request time off, bid for shifts, or change shifts. They will also be able to compare performance on key WFM metrics to targets and to peers. Everything is managed simply and easily from the WebStation portal.

### Supervisors

Similar to employees, supervisors have total visibility of schedules, events, open shifts, change and time off requests. This is supplemented with real-time monitoring of adherence. Supervisors can dig into data to understand trending issues or individual team member performance. WebStation offers the supervisor total control over their operation.

### Time Off Manager

Eliminate the administrative hassle of manual time-off management. Time Off Manager allows managers to set time off planning rules with a variety of parameters, such as time off types (PTO, sick leave, in lieu of, etc.), amount of time off allowed, and the rate of time off accrual. Both the Employee and the Supervisor versions of WFM WebStation offer a Time Off Bidding screen, enabling both parties to make time off elections, depending on the workforce rules of the organization. Requests are auto-approved or rejected according to organizational rules.

### Availability Points

Ensure service coverage while providing employees scheduling flexibility with Availability Points. Scheduler ensures that basic requirements are covered and Availability Points works with Scheduler to assign points to all remaining shifts. Employees are assigned points quotas they must accumulate weekly or monthly. Less desirable shifts are worth more points, and each employee can select the mix of shifts that best suits their preferences. Availability Points is particularly powerful for remote workers with schedule flexibility.

### Schedule Change Policy

Embed clear schedule change rules within your operation—supervisors and employees can make permission-based adjustments to their schedules without the need for bureaucratic, manual processes. Factor in minimum and maximum schedule loads, rest times, schedule sequencing and more.

### SmartSync

WFM can be tightly integrated into your other systems—back office systems, payroll, timekeeping, HR, Performance Management and more. SmartSync Application Programming Interfaces (APIs) simplify these connections, unifying various protocols, databases and functionality. No more paper-based processes and duplicate data entry—SmartSync wires WFM data and practices across your organization.

### eTrainer

WFM features eTrainer. A self-paced, computer-based training system delivered over your corporate intranet. Curriculum modules cover specific WFM features for employees and supervisors to facilitate training and speed up adoption.

## SOLUTION FEATURES



### CONFIGURATION

NICE IEX WFM is the most complete and configurable solution on the market. Its unmatched flexibility allows WFM professionals to fine-tune forecasts and schedules to specific requirements, and to set-up custom reporting. The solution is built on a rich client interface to handle complex calculations while providing “drag-and-drop” usability. For associates, WFM is available via a thin client (browser-based) interface. All aspects, especially WebStation, are designed to be simple, intuitive and readily adopted. Users can customize the way they view data (within permissions). Reporting can be customized and recurring reports automated and saved. Data can be viewed by team, site, region, or across the enterprise. Entity sets are also customizable so that people immediately see the information they need to generate the right insight and do their best work.



### ARCHITECTURE

The WFM solution allows organizations to deploy the architecture of their choice—a single server environment or distributed environment. The WFM server can be installed on the Windows 2008 R2 Standard or Enterprise. Server virtualization is supported for both options. We recommend X86 compatible hardware. WFM client software runs on Microsoft Windows 7, Vista or XP operating systems, and also supports an open database model that allows managers to choose.

WFM offers Lightweight Directory Access Protocol (LDAP) as an additional layer of security as required. User ID validation occurs in a LDAP directory, eliminating the need for a separate NICE IEX WFM solution ID and password.



### LANGUAGES

NICE IEX WFM is deployed globally in the following languages: Brazilian Portuguese, Japanese, Mandarin Chinese, English, French, German, Russian and Spanish. In addition to these languages, the Employee and Supervisor WebStation features are also available in: Danish, Dutch, Finnish, Hebrew, Hungarian, Italian, Polish, Portuguese and Swedish.



### SECURITY

Each WFM user is assigned a user name and password and they must be logged in to access any solution features. On Windows Workstations, the NICE IEX WFM system can accept the credentials of an authorized Windows login. User accounts and permissions are controlled via a central security system. WFM professionals can ensure the right level of access for every individual across the organizational hierarchy.

## SUMMARY

NICE IEX WFM offers the most complete and configurable solution on the market. The solution's unique flexibility puts control in the hands of the exacting WFM professional—allowing for more precise forecasts, capacity plans, resource allocations, and schedules.

The value of WFM is amplified by its user-centric design and features. All users have a single WebStation portal to access everything they need to understand their schedules and their responsibilities. Supervisors have all the data they need to understand trends, react to changes, and to best support their people. Ultimately, this drives a level of employee engagement, alignment and action that helps the organization deliver a better customer experience at a lower cost.







## ABOUT NICE

NICE (NASDAQ: NICE) is the worldwide leader of software solutions that deliver strategic insights by capturing and analyzing mass quantities of structured and unstructured data in real time from multiple sources, including, phone calls, mobile apps, emails, chat, social media, and video. NICE's solutions enable organizations to take the Next-Best-Action to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies.

[www.nice.com](http://www.nice.com)

### GLOBAL INTERNATIONAL HQ, ISRAEL,

T +972 9 775 3777

F +972 9 743 4282

### AMERICAS, NORTH AMERICA,

T +1 201 964 2600

F +1 201 964 2610

### EMEA, EUROPE & MIDDLE EAST,

T +44 0 1489 771 200

F +44 0 1489 771 665

### ASIA PACIFIC, SINGAPORE OFFICE

T + 65 6222 5123

F +65 6222 5459

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