

What is the business value of moving from Excel to WFM?



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Introduction

In years gone by there has been a degree of skepticism, especially from those in control of the company purse strings, about workforce management tools (WFM). This was perhaps born from a mix of myth and misunderstanding, and because, like anything, technology solutions evolve and improve with time. Previously, the three primary reasons for people choosing to stick with simpler, more manual methods rather than upgrading to a WFM solution were its cost, difficulty to use and lack of accuracy to balance out the cost and effort.

Yet now these worries are outdated. Costs are proven to be quickly ruled out through savings and profits after implementation, WFM software has become more and more user-friendly, and it provides a higher level of accuracy through the use of historical and real-time data for automation. All in all, WFM is the most accurate, easy-to-use and cost-effective solution for contact centers looking to organize and manage their workforce.

In spite of this, many centers, especially those in the small to mid-size range, still remain loyal to Excel (and other simpler schedule management tools) and/or skeptical of WFM. However, WFM is fast becoming absolutely essential for contact centers that are growing, or looking to grow. Thus, in aiming to move the contact center forward, and handle the challenges that come with such growth, a clear picture is needed. An understanding of the limitations that could come through not changing, and the benefits that will be felt by embracing such change, must be offered.

This Teleopti white paper will explore the two-fold business value of WFM: The Excel problems/limitations left behind and the improvements found with WFM.

Possible problems with Excel

Of course Excel isn't the only alternative planning tool to WFM, nor the lone spreadsheet provider, but it remains the most commonly known solution to be used, especially for smaller contact centers (of 50 or less). With it being the main alternative that managers and planners use, Excel naturally falls under the spotlight in comparing its capabilities to a WFM software solution.

It is important to remember that Excel is a powerful, multi-dimensional tool for many contact centers, especially those with a lower number of agents, all operating in a single place utilizing only one or, at most, a few skills. However, if a company is wishing to expand in volume and/or internationally there will likely be a point at which it needs to consider a wider solution, a WFM solution. Below are the limitations (and worries) that could come for companies of a larger size with greater needs if they continue to work purely with Excel.

Time-consuming

Manager and planners end up spending the majority of their time creating manual schedules and reports. For one Teleopti customer, before moving to WFM scheduling automation, they could spend 4 to 5 days working in Excel to create just two weeks of schedule. The time-consuming nature of this manual process forces those in management or leadership positions to be stuck report-building rather than focusing on business goals or overseeing their agents.



Less flexible and open

Excel is very flexible in its coding potential but it is less open and flexible than WFM in how it can handle multiple variations in agent skills or shift starts, or introducing new systems. Excel specialists and planners have to create new files or formulas to allow for these variations, potentially creating more and more files to swap between. With WFM, the new systems are coded for the user and are unified in how they work together. Excel's difficulty in building this integrated flexibility thus makes it harder for the contact center to grow in its overall capabilities and channel usage. When it comes to shift scheduling, some powerful spreadsheets can let agents work different shifts but with less granularity for shift starts (WFM solutions, such as Teleopti's, can operate with 15 minute intervals for shift start times). It is equally not as easy to juggle agents with different types of contracts or cater to those who wish to work remotely, an option that is becoming increasingly popular.

Reduced responsiveness to issues

When something goes 'wrong' in the daily running of a contact center, say an unprecedentedly high call volume or a larger than normal number of agents off sick, Excel doesn't have the real-time responsiveness to solve these intraday issues. It is consequently on the heads of planners, managers and team leaders to handle and solve all scheduling or overflow problems that arise. In comparison, WFM intraday and scheduling solutions can work with those in such positions to fill the gaps created and refocus the scheduling for certain channels.

Inability to monitor adherence

Excel planning tools cannot monitor how the contact center is running or whether the agents are doing the scheduled activities marked down for them in the spreadsheets. That equally means that these sheets don't have the option to send alarms or help managers/team leaders react to agents that are out of adherence. As a result, it is more difficult for those in managerial positions to do the actual managing (especially if they are stuck in front of their computers writing reports and schedules).

Limitations on international growth

Excel spreadsheets aren't properly prepared to aid company growth into new markets, as they can't work well across multiple languages, time zones or locations. Separate files must be built to cater to new languages,

either for agent skills or user interfaces, which are then difficult to cross-utilize when overflow situations happen. Of course this is a 'deal-breaker' for large, international organizations but also something worrying for a relatively new, small company with international ambitions. If a company is to grow, it doesn't want the contact center to impinge this with mismanaged agents and poor customer service quality.

Limitations on growth, in general

Just as a spreadsheet system could put restrictions on the geographical growth of a company and its contact center sites, Excel is simply not capable of handling high volumes of agents. Excel is a powerful tool for handling very large data sets, allowing multiple entries to be simultaneously processed. However, this ability isn't always well translated into the organizing of hundreds of agents, and simple things like schedule changes or over-time can be very difficult to communicate quickly. So, even if one lone contact center, speaking one language on one time-clock was to grow, an Excel solution couldn't easily support this, and issues would soon present themselves. This is all on top of having more and more agents with limited ways to monitor what they are doing, stretching the management team.

Greater likelihood of human error

With Excel, the slightest wrong mouse click could ruin formulas and undo years of building, all because it isn't very human proof. It is also not very obvious when these errors occur, leading to decisions being taken based on inaccurate data. Furthermore, once a problem has occurred, the complex web of cells and formulas means it is near impossible to find out where the original issue lies, or who is responsible for it.

EXAMPLE: A slight segue from Workforce Management but a clear instance of the issues that manual processes and copying and pasting in spreadsheets can cause: JPMorgan's 2012 \$6.2 billion losses.

A Task Force investigation found that Excel flaws were partially to blame as those tasked with copying and pasting data in Excel had been rushing and missed necessary steps that Excel hadn't highlighted, until it was too late. No planner or forecaster should have the guilt or stress of company-wide problems due to an easy-to-make mistake in a spreadsheet.

On the agent side, problems can occur if they print or save an outdated schedule. By contrast web-based self-service portals help agents stay up to date with what they should be doing, and when.

Mono not multi-use

Looking more closely at how planners and forecasters interact with an Excel platform, there is the simple but core issue that normal Excel sheets only allow one person in them at once. Consequently, there is now the online, Cloud version to try and avoid this issue. Such software (non-Cloud) problems, and efforts to solve it, reveal how spreadsheets aren't a natural tool for a large or growing contact center that needs multiple resource planners and schedulers working simultaneously. The possibility of saving issues due to multiple users saving old copies over more recent ones reflects Excel's propensity for errors. These errors should never even be a source of concern in the running of a contact center, or something that diverts attention from customer service, business goals and company expansion.

Churn challenges

The data-focused, non-flexible nature of Excel often fails to lend itself to handling employee turnover. It doesn't offer a way of quickly bridging the scheduling and skills gap left by an outgoing employee, nor the onboarding of a new employee. As employees leave and are hired, skill sets and proficiencies are subject to large degrees of variation. Matching the continually varying skill base against a need which also varies over time, requires flexibility in order to deliver business goals. This can be lacking in Excel methods or very complicated to setup and maintain. The more a company grows, the more agents that are going to be arriving and leaving, which demands a flexible, unified solution.

Communication crisis

In the 21st century, where the immediacy of communication is a critical must in all companies, especially contact centers, Excel lacks support for these instantaneous communication channels. It doesn't have the option for managers or leaders to communicate with staff 'in-spreadsheet' meaning it can be difficult to notify agents of implemented schedule changes. This, in turn, could cause agent



dissatisfaction, lost revenue and poor service levels. The issues of Excel and communication continue in its low-level flexibility to work with multi-channel contact centers, alongside the difficulty of having multi-skilled schedules and agents.

The business value of WFM

Where Excel starts to find its limitations is where WFM finds its strengths, it grows as the company grows and has far-reaching, flexible capabilities to organize all staff, respond to problems, and drive profits and savings simultaneously. Every level and role within the organization will reap the benefits of a WFM solution. Yet saying this is one thing, proving it is another. In this chapter, Teleopti will show all the savings and positive changes that WFM offers for the contact center.

The valuable benefits discussed mainly focus on what would be felt with a base WFM package, but it is important to add that beyond the base offering, there is even more potential for center improvements with add-on modules. The fact that it is possible to integrate and expand a WFM solution, such as with Lifestyle or Training modules, is in itself another plus for WFM. Also offering another reason as to why it is the best choice for ambitious, upwardly-mobile companies, wanting to parallel business growth with consistently high service levels.

Improve how you use, treat and react to your workforce

Reduces agent under- or over-staffing

The functionality of WFM forecasting and the optimizable automation of scheduling reduces the unnecessary cost that comes with over-staffing and heightens service levels through less under-staffing. Such an outcome will see customer prospecting increase and customer losses decrease. If a situation calls for staffing changes, or a change of any type, WFM can make this happen easily, with a lower threshold of energy required than would be with Excel.

WFM scheduling also lends itself to flexible contracts – full-time or part-time – as it can more easily schedule to contract type rather than being only able to work with one set weekly contract. This gives agents the sense that they are working in a more flexible work place that can cater to lifestyle requirements e.g. a mother who wants to work 80% rather than full time or a part-time agent that needs their start times to change from day to day and week to week. Such employee positivity as an invaluable ROI will be discussed later in this chapter.

Easier skills-based scheduling

WFM automates the knowledge of agent skills (or shift preferences) that would often otherwise be left to the memories of resource planners using an Excel system. In WFM the agents can input their shift preferences and planners can also note agent skill sets so that the software always remembers this, rather than relying on resource planners, who might one day leave and take this knowledge with them. The opportunity to build up a skills profile for each and every agent, and schedule their shifts accordingly, reduces handling time as the agents with the correct skills know how to handle each case and call, efficiently. It also helps with the quality of customer service as you are scheduling the right person for the job.

Reduced overtime expenditure

Schedule preparedness, intraday and forecasting features allow planners to see when overtime will be needed, well in advance. This is instead of having to suddenly react to the need for more staff which could lead to panicked, costly decisions.

Increased agent adherence

Self-service portals, where an agent can see their schedule, along with any recent changes, keeps them up-to-date with what they should be doing, and when. Also, using this type of tool, they can view their adherence levels for the previous day, letting them know if they have been doing well or not, and giving them a greater understanding of their day and work. Equally, there are modules that give team leaders up-to-the-minute schedules for their agents meaning they can more easily ensure schedules are being kept to. Real-time adherence modules are available which will clearly alert a manager if and when an agent is out-of-adherence through checking their channel activity, such as if they are in calls or not.

Employee empowerment

This employee-focused benefit might not seem like an outright, quantifiable ROI yet it lends itself to many other savings and profits within the company. WFM supports this sense of engagement and empowerment with agent access to schedules and their KPIs (including answer rate, handle time and adherence), giving a sense of autonomy, and helping them plan their personal lives to achieve a better work-life balance.

Preference options mean agents are more likely to work the hours they prefer, and less likely to work hours that leave them begrudging the company and management. Another effective WFM benefit in helping to minimize agent frustration with the 'suits upstairs' is the greater degree of efficiency that comes with scheduling. Agents can access their timetable sooner rather than only a few days before. Better communications systems within self-service portals also help nurture agents' sense of being acknowledged.

Engagement can similarly come with agent motivation, such as through Gamification. Such motivation can at first be garnered in the use of short-term plans with badges and scoreboards to drive natural competition, and then long-term gamification plans where they work towards a bigger prize, and which could give a greater sense of worth. WFM [Gamification](#) offers a system for managers to motivate and understand their employees, as well as leaving room to play with it in innovative ways.

Companies are realizing the importance of employee engagement across the world. Indeed, Deloitte's [Human Capital Trends 2015](#) report found that Culture and Engagement is now the No. 1 driver for most companies, where it previously didn't chart in 2014. Furthermore, Gartner announced the name and criteria change of its Workforce Optimization Magic Quadrant to Workforce Engagement Management in 2017. A shift that reflects the ever-increasing importance of employee motivation for company environment, growth and savings.

Reduced agent attrition

Firstly, employee churn should be far lower with improvements in employee engagement, efficiency, correct staffing levels, and skills-based scheduling. Secondly, as Everest Group found in their [The Business Impact of Contact Center Attrition](#) report, it is at times a positive essential for a company to have some degree of attrition. WFM offers a preparedness for this. It creates a readiness to track the skills need/deficit, schedule the onboarding of new agents and cover the in-between phases of moving from an old agent to a new one.

Savings in sickness rates

Again, this ties to better management and scheduling of agents, agents are less likely to get sick if they aren't overworked, don't feel demotivated through being under-used or put on

a task that doesn't fit their skills. In addition, WFM solutions, with their intraday capabilities, can react to unexpected absences (e.g. sickness) far faster, and flexibly, than your typical Excel spreadsheet.

Real-time responsiveness

WFM's intraday features mean that, rather than always feeling one step behind, planners and managers can calmly deal with issues as they arise, whether that is a mass of sick call-ins or a high call volume. Real time data feeds are available for the majority of ACDs on the market today. Yet whilst historical data can be imported via files and even Database interfaces into Excel, real time data needs to adapt to ongoing events which is often not possible for the majority of companies using Excel today.

Cross-company connectivity

WFM aids international growth and connectivity with it allowing your agents to work across countries and time zones, in a solution that operates in their own language. Managers and leaders are able to group staff by more than just one set team, in one location, but by multiple criteria, such as skill or language. They can really find the agents they need. A sense of international collaboration also opens the mindset of managers, planners, leaders and agents. It could foster a sense of company direction – 'all steering the ship together' – rather than the sense of separation that often appears between employees and employers.



The big one: handling high volumes of agents

WFM can grow as your company grows. It assists your growth, supporting it, rather than restraining it as Excel can. WFM is a useable solution for 40 or 50 agents up to a contact center of thousands of agents, working in multiple locations. This is due to a combination of all the benefits listed above, but especially in its flexibility and communication possibilities, along with the rapid growth that working in the Cloud, rather than purely with on-site servers, allows. WFM is ambitious but supportive and user-friendly in its capabilities.

Time and cost savings with admin reduction

Less time spent on manual scheduling and forecasting

The automation of scheduling and forecasting with WFM means that planners and managers can instead be focused on business goals such as product sales or call quality. There is also less time spent trying to fix or find mistakes.

Integrating WFM with automated payroll solutions

The integration possibilities and SDK (software development kit) of WFM solutions, such as Teleopti's, can link schedules to automated payroll systems, reducing the manual HR time spent on salaries. Saving HR personnel from wasting a hefty proportion of their workload on admin allows them to instead focus on company-building activities, such as recruiting the best talent and training them up.

24/7 support system

When using Excel, a lot of time is often lost in basic set-ups or problem solving. With WFM, you have consultants and resources at hand to help you. You aren't left on your own to google the answers, wasting valuable personal or working time, which can often happen when faced with a spreadsheet that isn't doing what you want it to.

Better customer experience

Happier, motivated agents and better organization leads to correct staffing, lower abandon rates, better service levels and generally better quality of calls through the right agents efficiently answering the right calls/emails/chat messages.

If you are still skeptical of the relationship between employee engagement and your company's potential ROI then it seems wise to take a look at [Glassdoor's 2015 Does Company Culture Pay Off?](#) research report. It indicates that companies with a high level of employee engagement out-perform the S&P 500 by 122%. Additionally, [Accenture research](#) has shown that a 10% increase in employee engagement levels can increase a company's customer service levels by 5% and profits by 2%.

On the subject of service levels, Excel can, at points, achieve higher service levels than WFM, but this is dependent on a very stable environment of perfect staff attendance and call demand. At other times, when surprise situations occur, Excel is limited in how it can flexibly deal with this and service levels can instead drop to worrying lows. By contrast, WFM offers a consistency of service level, through an ability to constantly react and adapt, that helps you avoid the lows that could lose customers and profits. For example, it seems far better to achieve a consistent average of 80% service levels, than balancing out to the same 80% through levels ranging from 100% to 60%. The risks are a lot lower at least. Consistency also means that managers are far more likely to hit business goals.

All of these discussed WFM benefits feed into lower overall costs and higher business profits, meaning a healthy ROI, especially when you can buy WFM as a Cloud solution only paying for what you use, when you use it.

The facts & figures of WFM's business value with Teleopti

Teleopti can certainly talk about the plethora of positives that come through upgrading to a WFM solution but seeing is believing. If you are keen to know the fundamental figures of your potential ROI before committing to the software, then you can always speak with a [local Sales Manager](#) or Teleopti has two number-focused options that could work for you.

Operational Assessment

A Teleopti Operational Assessment is a quick yet powerful study of the current situation in your contact center, conducted by experienced consultants. It identifies problem areas and their causes, and suggests proven improvements methods based on Teleopti experience. The assessment highlights operating costs and benefits for the contact center; it gives an informed insight into the potential ROI for the WFM project and leaves both parties with a better understanding of the challenges and benefits on the road ahead. The findings and conclusions of a Teleopti Operational Assessment can then be used to measure the actual improvement after Teleopti WFM implementation.

Teleopti Savings Calculator

Teleopti understands the deliberation that can go into deciding how to manage your contact center, especially as it grows and evolves. Consequently, Teleopti provides a savings calculator to help find the answers and figures needed when making decisions for the future of your company, center and staff. Teleopti's calculator focuses on the savings that WFM offers,

such as those achieved with staff optimization and adherence, attrition and sickness rate improvements and reductions in administration. These savings will instigate lower costs and trigger better service, the magic combination for higher profit margins in a contact center. Of course these savings are just the tip of the iceberg when it comes to the benefits of Teleopti's WFM solution, but it seems like a very good place to start.



Conclusion: managing the move with Teleopti

In this white paper, both the potential Excel problems that growing companies should migrate from, and the benefits that would be found in moving to WFM, have been discussed. However, how to get from point A to point B is never forgotten. Or at least it shouldn't be. Teleopti's whitepaper '[Why do WFM projects fail? - And what to do?](#)' examines four pitfalls that must be avoided when implementing WFM in your center. Teleopti will make sure you never fall into these pitfalls. For at Teleopti, we believe in the 'human touch,' and there will be consultants and engineers there to help you along every step of your journey from Excel to WFM: implementation, utilization and evaluation. A good workforce management solution offers you a support network that you can always depend on. The profits and savings with that? Invaluable.

Robert Bergman, Product Owner



Teleopti, a top, global provider of workforce management software, offers a world-class WFM solution that is sophisticated, localized and easy to use. As the largest "best-of-breed" vendor, Teleopti focuses on helping contact centers, back offices and retail stores improve customer service, employee satisfaction and profitability – through optimized, automated forecasting and scheduling with cutting-edge features to empower and engage employees.

Founded in 1992, Swedish-established Teleopti has customers in over 85 countries, numerous offices around the world – from Beijing to São Paulo – and a comprehensive global network of partners. With a record of continuous net profitability for 25 years and with high customer satisfaction ratings, Teleopti serves as a reliable partner. Find out more: www.teleopti.com