



Forecasting Analysis

Webinar handout
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Table of Contents

About this document.....	2
Why review past forecasts?	2
What's the difference between forecast reporting and forecast analysis?.....	3
Running reports for past forecasts.....	3
Overview	4
Step-by-step	4
Contact volume and handle time	4
Shrinkage Forecast.....	5
Enterprise model forecast (if using the EM default shrinkage)	5
Shrinkage forecast report (if using a shrinkage forecast profile).....	6
Shrinkage actuals.....	7
How to use the spreadsheet.....	7
Evaluating the results.....	8
What about agent behavior?	8
Revising your forecast	9
Activity level revision.....	9
Step-by-step	9



About this document

This document accompanies the CommunityWFM College webinar *Forecasting Analysis*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

The analysis method described in the webinar includes using a separate Excel workbook for recording contact center data.

Why review past forecasts?

Analyzing your past forecasts and determining how accurate they were can help you refine your future forecasts to have better predictions of your staffing requirements. Forecasting uses projected contact volumes, AHT, and shrinkage to predict the staffing required to meet your set service metric goal.

Forecast analysis is the **review** part of the WFM cycle of Planning > Scheduling > Reviewing.

How often do you review your old forecasts?

How accurate was your last forecast?

While forecasting is all about looking to the future, it's a good idea to look back and determine how accurate your past forecasts have been. If you don't analyze past performance, you won't be able to identify areas and trends where you can make improvements.

For example, if you always use a 4-week rolling forecast profile, you aren't accounting for seasonality, which exists for most contact centers. With a years' worth of data, you can predict staffing needs and identify recurring issues.

By identifying seasonal trends, you will know where to adjust your forecast. Is your center busier in the 4 weeks prior to Christmas? Is there a summer slump in August?

Analyzing your forecasts is like doing a tune-up on your car. It will help keep things running smoothly.

Overview

1. Run the published forecast and shrinkage reports for past weeks, preferably at the activity or folder level.
2. Enter the data into the Excel spreadsheet (CommunityWFM_Forecast-Analysis-and-Shrink).
3. Compare projected vs actuals (variances) and analyze for patterns and trends.

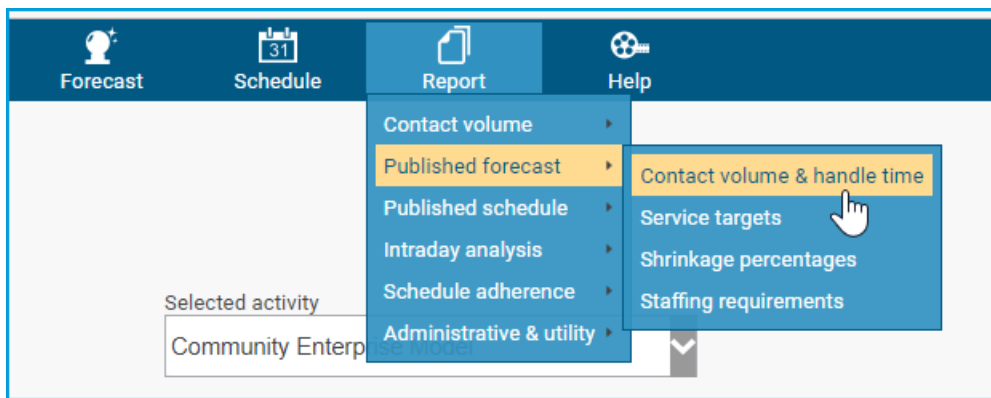
To view the call volume and AHT history, you can look at working or published forecasts.

To view actual shrinkage, run the published schedule shrinkage report (not a shrinkage forecast report).

Step-by-step

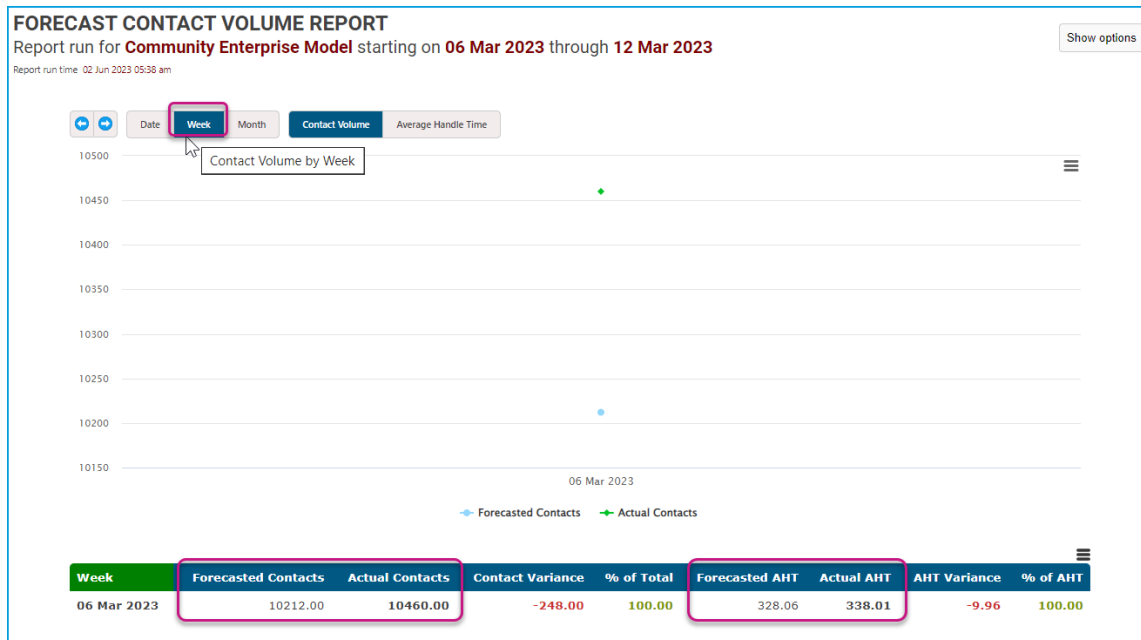
Contact volume and handle time

1. Go to Report > Published forecast > Contact volume & handle time.



2. Click *Show options* to expand the report menu.
3. Select the activity and date range in the past.
We recommend running the report on a Monday or Tuesday for the prior week.
4. Click *Apply options*.

- Change the filter to show the full week(s).



- Review the forecasted and actual contacts and AHT and enter the data into the Excel spreadsheet. The spreadsheet will calculate the variance.

Forecasted Contacts	Actual Contacts	Total Contact Variance	Forecast Contact Variance Percentage	Forecasted AHT	Actual AHT	Total AHT Variance	AHT Variance Percentage	Forecast Discretionary Shrinkage	Actual Discretionary Shrinkage
10212	10460	-248	2.4%	328	338	-10	3.0%		
		0	0.0%			0	0.0%		

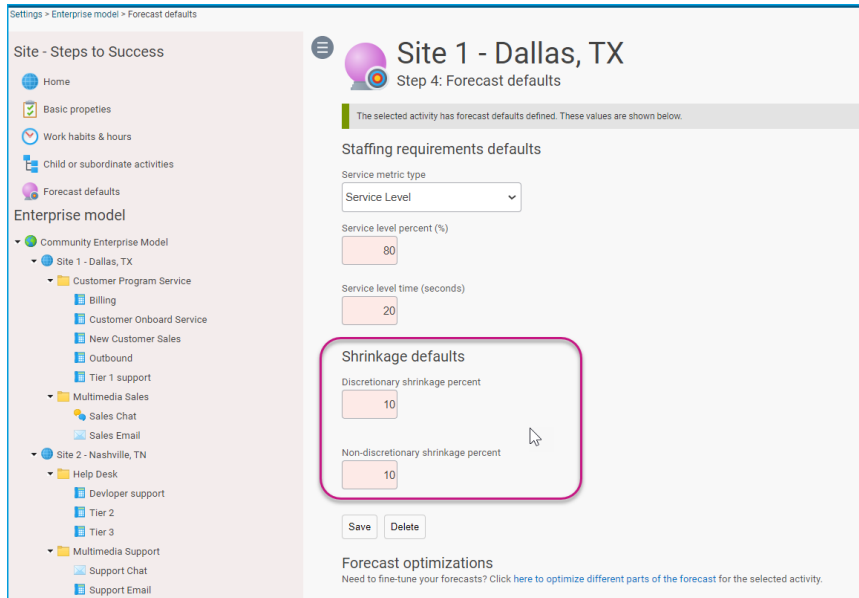
Shrinkage Forecast

Next, look at the forecast shrinkage values. Did you use the Enterprise Model forecast shrinkage defaults? Or a shrinkage forecast profile? Enter the forecast shrinkage percentages into the spreadsheet.

Enterprise model forecast (if using the EM default shrinkage)

- Navigate to Settings > Enterprise model > Select an Activity > Select *Forecast targets and defaults* tile.

2. Enter the numbers for discretionary and non-discretionary shrinkage defaults into the spreadsheet.



Settings > Enterprise model > Forecast defaults

Site - Steps to Success

- Home
- Basic properties
- Work habits & hours
- Child or subordinate activities
- Forecast defaults

Enterprise model

- Community Enterprise Model
 - Site 1 - Dallas, TX
 - Customer Program Service
 - Billing
 - Customer Onboard Service
 - New Customer Sales
 - Outbound
 - Tier 1 support
 - Multimedia Sales
 - Sales Chat
 - Sales Email
 - Site 2 - Nashville, TN
 - Help Desk
 - Developer support
 - Tier 2
 - Tier 3
 - Multimedia Support
 - Support Chat
 - Support Email

Site 1 - Dallas, TX
Step 4: Forecast defaults

The selected activity has forecast defaults defined. These values are shown below.

Staffing requirements defaults

Service metric type
Service Level

Service level percent (%)
80

Service level time (seconds)
20

Shrinkage defaults

Discretionary shrinkage percent
10

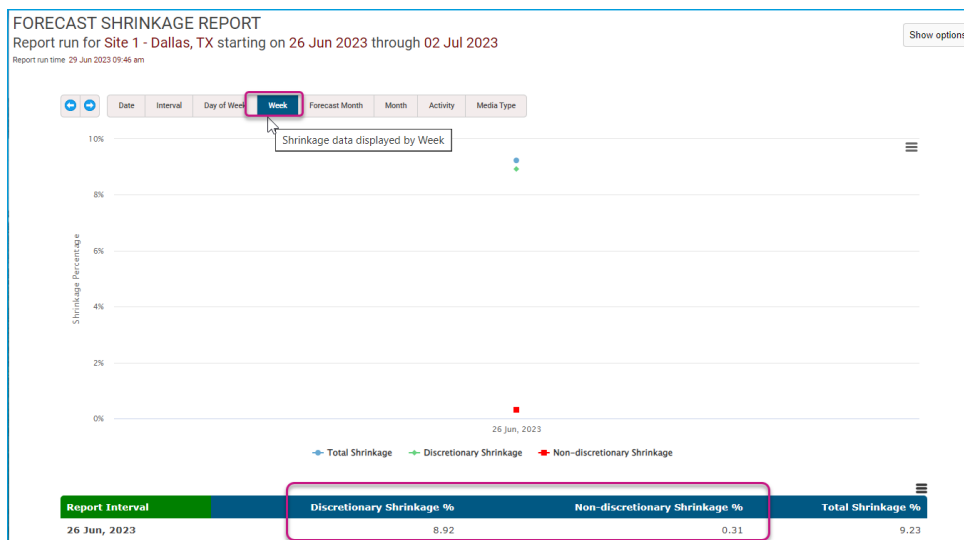
Non-discretionary shrinkage percent
10

Save Delete

Forecast optimizations
Need to fine-tune your forecasts? Click [here](#) to optimize different parts of the forecast for the selected activity.

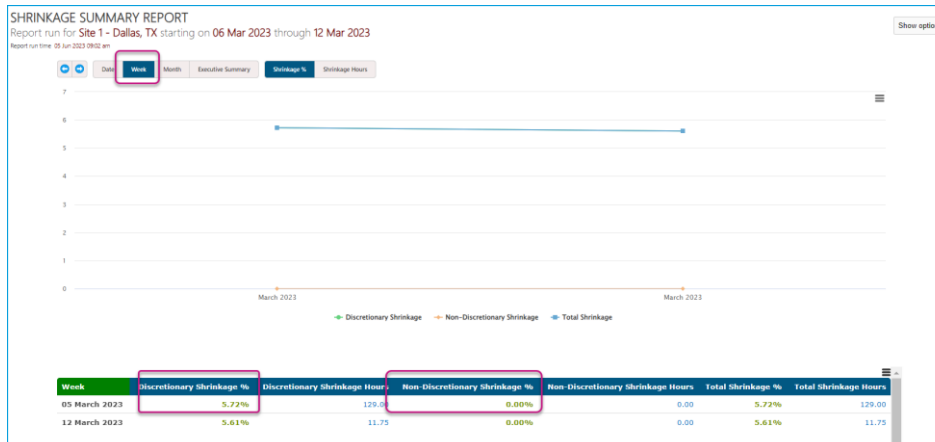
Shrinkage forecast report (if using a shrinkage forecast profile)

1. Navigate to Report > Published forecast > Shrinkage percentages.
2. Click *Show options*, select an Activity, and enter the date range.
3. Click *Apply options*.
4. Change the filter to Week.
5. Enter the numbers for discretionary and non-discretionary shrinkage into the spreadsheet.



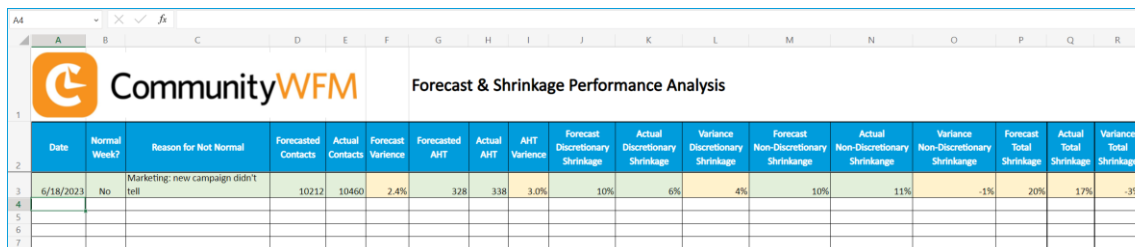
Shrinkage actuals

1. Run a shrinkage report (not a forecast shrinkage report). Go to Report > Published schedule > Shrinkage report.
2. Run it for the same activity and date range.
3. Change the filter to Week and review the discretionary and non-discretionary shrinkage percentages.
4. Enter these numbers into the spreadsheet.



How to use the spreadsheet

Ideally, have a worksheet for each activity.



Date	Normal Week?	Reason for Not Normal	Forecasted Contacts	Actual Contacts	Forecast Variance	Forecasted AHT	Actual AHT	AHT Variance	Forecast Discretionary Shrinkage	Actual Discretionary Shrinkage	Variance Discretionary Shrinkage	Forecast Non-Discretionary Shrinkage	Actual Non-Discretionary Shrinkage	Variance Non-Discretionary Shrinkage	Forecast Total Shrinkage	Actual Total Shrinkage	Variance Total Shrinkage
6/18/2023	No	Marketing: new campaign didn't tell	10212	10460	2.4%	328	338	3.0%	10%	6%	4%	10%	11%	-1%	20%	17%	-3%

Date: Plan to do one week per row.

Normal week? Was it a normal week? Were there any mitigating factors (extra unplanned meetings, an unexpected marketing initiative, a flu epidemic in the contact center)? Be specific so in six months when asked why you didn't meet service level, you'll have the answer.

Forecasted and Actual Contacts, AHT, shrinkage: Enter the data for each column from the reports into the spreadsheet.

Variances: The formulas in the spreadsheet will calculate the variance for each field.



Evaluating the results

Do this weekly and you will begin to see trends, e.g., is your forecast always off by 10%? Then you can dig deeper to see where the problem is. It could be one skill that is throwing off the whole forecast.

When you do this over time you can start to see seasonality—how your requirements vary due to holidays and the seasons. And will see how much of an adjustment you need to make in your forecasts to account for the differences.

What about agent behavior?

As close as you get in your forecast with defining events, this will not account for agent behavior. Agents may put themselves in a 'not ready' state to use the restroom, take a smoke break, or chat with a teammate and events in the schedule do not account for that behavior.

Look at a historical adherence report, and if you've defined your unscheduled activities as out of adherence, you can take the inverse of your in-queue variance to see the amount of shrinkage due to agent behavior that includes unscheduled time out of queue or out of adherence.

We recommend defining your unscheduled activities (e.g., sick, late, going home early), things that take agents away from your plan based on their behavior, in the event type behavior with the question: *For real-time adherence, should agents be considered logged into queue during events of this type?* Set this question to *Yes* so you can track adherence. This is the predefined setting for Intra-day Exception Event.


Late

Step 2: Event type behaviors

[Predefined event type classifications](#)
[Custom behavior settings](#)

Answer the following questions to determine the behavior of this event type.

Manually select the behavior options for this event type.

	YES	NO
Can this event type be used as a default work type?	☐	☐
Does this event occur at work / on site?	☐	☐
Is this event type's start time and duration constrained by an agent work type event?	☐	☐
Is the scheduled agent logged into a queue during events of this type?	☐	☐
Does this event type require supervisor approval?	☐	☐
Are agents available for callback into queue during events of this type?	☐	☐
Do events of this type travel with agent schedule swaps?	☐	☐
For real-time adherence, should agents be considered logged into queue during events of this type?	☒	☐
Is this event type available for agent selection in the Agent Self-Service Kiosk?	☐	☐
If eligible for Agent Self-Service Kiosk, does this require runtime validation?	☐	☐

[Save behaviors](#)
[Clear selections](#)

Revising your forecast

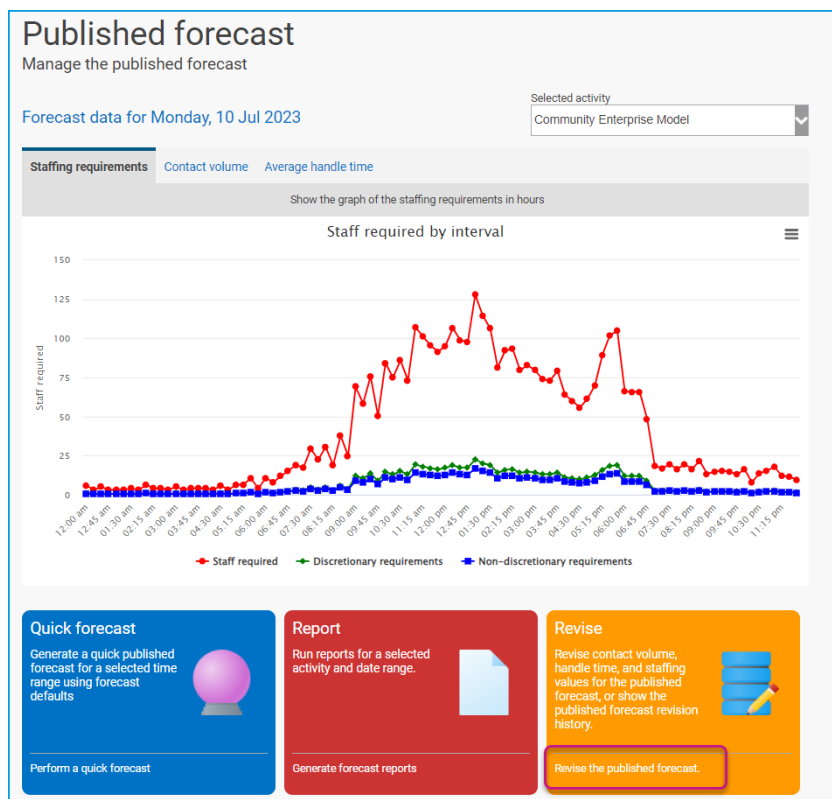
Now that you know where your history didn't quite live up to expectations, how do you update your published forecast for next month? How do you fix your forecast to reflect more accurately what you've learned from examining the history?

Activity level revision

While you could revise a working forecast at the site level then republish it, this is only effective if the change in call volume across all activities is equally up or down. However, if each activity has a variance that is unique, you should revise each activity separately in the published forecast. Revising the published forecast will update the staffing requirements.

Step-by-step

1. Go to Forecast > Published forecast
2. In the Revise tile, click *Revise the published forecast*.



In the Revision options pop-up, select *Revise weekly totals*.

Revision options

Select from the following options to revise the published forecast



Revise specific intervals
Revise forecasted contact volume, handle time or staffing requirements for each interval of a selected date.



Revise daily totals
Revise the daily total forecasted contact volume, handle time or staffing requirements for a range of dates.



Revise weekly totals
Revise the weekly total forecasted contact volume, handle time or staffing requirements for a range of dates.



Revise monthly totals
Revise the monthly total forecasted contact volume, handle time or staffing requirements for a range of dates.



Show revision history
Show the published forecast revision history report and optionally delete unwanted forecast revisions.

Cancel

Step 1: Specify revision parameters Select a leaf-node activity and date range and add a comment (required).

123

Revise published forecast

Step 1: Specify revision parameters

Selected activity
Billing

From date
7/11/2023

Through date
7/17/2023

Time zone
Use my default time zone

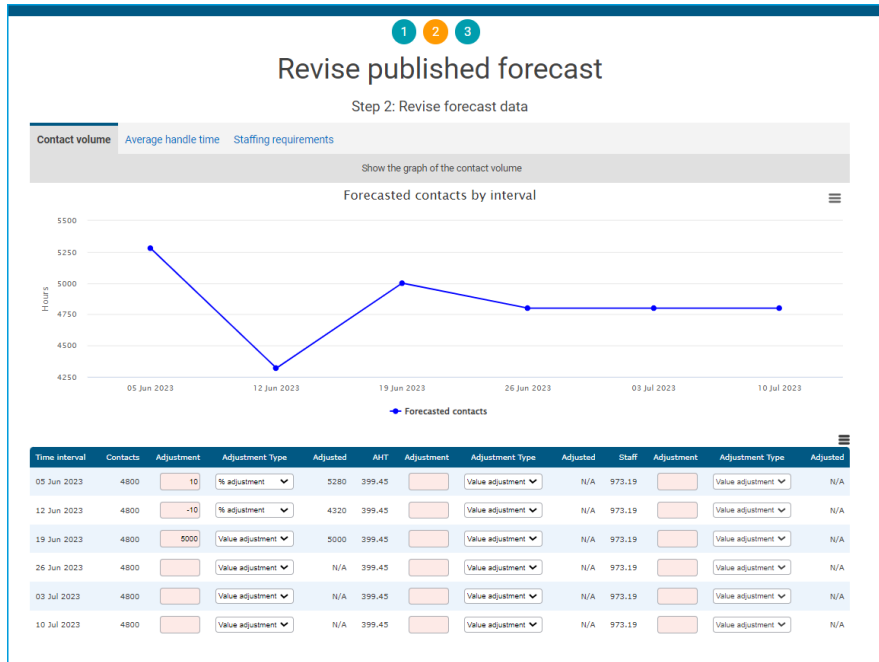
Comments
revised Billing based on forecast analysis for July.

Required field

Next

Click *Next*.

Step 2: Revise forecast data In the table, for each day enter the adjustment to Contact Volume and/or AHT. Select whether the adjustment is a *Value adjustment* (a number) or a *% adjustment*, with numbers based on your analysis of your data in the spreadsheet.



Click *Save*.

Step 3: Finish Review the results then click *Finish*.

1 2 3

Revise published forecast

Step 3: Finish

Success?	Time interval	Notes
✓	05 Jun 2023 12 Jun 2023	Successfully revised the published forecast.
✓	12 Jun 2023 19 Jun 2023	Successfully revised the published forecast.
✓	19 Jun 2023 26 Jun 2023	Successfully revised the published forecast.
✗	26 Jun 2023 03 Jul 2023	Nothing to revise in contact volume, handle time or staffing requirements, please verify your input values.
✗	03 Jul 2023 10 Jul 2023	Nothing to revise in contact volume, handle time or staffing requirements, please verify your input values.
✗	10 Jul 2023 17 Jul 2023	Nothing to revise in contact volume, handle time or staffing requirements, please verify your input values.

Finish