



# AI WFM Forecasting

Webinar handout  
Version: March 19, 2026

## Table of Contents

<b>About this document.....</b>	<b>2</b>
<b>What is AI forecasting?.....</b>	<b>2</b>
<b>Using AI forecasting.....</b>	<b>2</b>
Enable the AI forecasting service.....	2
Set up the AI forecast.....	4
Setup > Basic properties.....	4
Forecast recurrence.....	5
Machine learning.....	7
Manage existing forecasts.....	10
Working Forecasts.....	11
<b>Overview of AI Forecasting Flow.....</b>	<b>12</b>

## About this document

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

## What is AI forecasting?

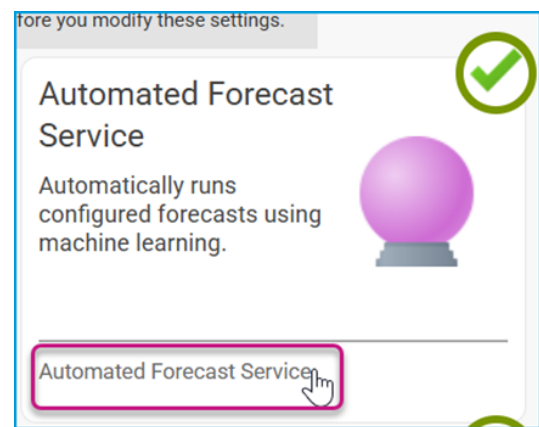
**Note:** AI features are only available in the Enterprise (Ultimate) version of CommunityWFM.

Automated forecasting allows the option to use closed-environment, predictive intelligence to automate forecasting, and to build and manage automated forecasts to model your business activity. The learning engine can intelligently measure seasonality and trends, as well as prioritize recent data over stale data and automatically deprioritize anomalous events and special days. Automatically use up to the last five years of your available historical data to create forecasts and, if desired, generate/publish staffing requirements. The more data in your system, the more accurate the forecast, and as always, you can edit and revise the forecast as needed to meet the needs of your center.

## Using AI forecasting

### Enable the AI forecasting service

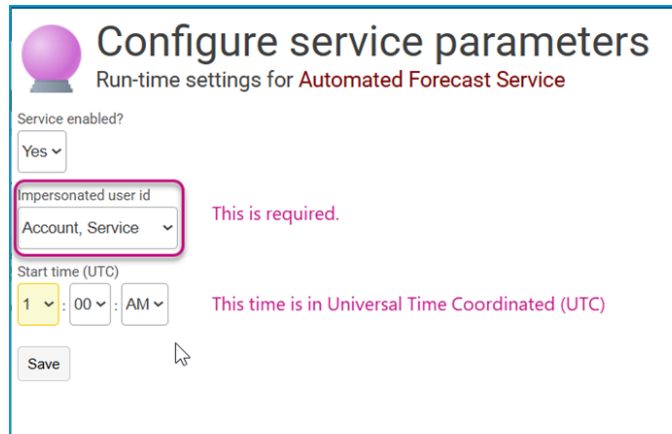
First, enable the service by navigating to Settings > Application settings > Administrative settings > Services and click *Automated Forecast Service*.



**Service enabled?** Select Yes to enable AI forecasting to run in the background.

**Impersonated user id:** Select from the list of supervisor or higher people. There must be a designated user ID for the service to run. (Recommended: Service Account)

**Start time:** This time is in UTC (Universal Time Coordinated). Select a time that is usually slow for your center to run this background service. Each day the service will run at the selected time and check if there are any pending forecasts to be run that day. If there are pending forecasts, they will run at this time.



Visit <https://www.utctime.net/utc-time-zone-converter>

### Common Conversions

#### EST - Winter Months

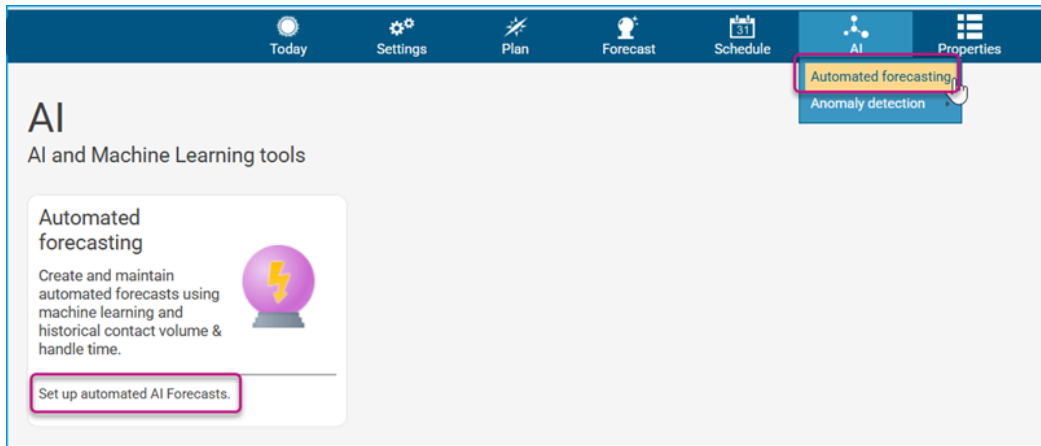
- 00:00 UTC = 7:00 PM EST (Previous Day)
- 06:00 UTC = 1:00 AM EST
- 12:00 (Noon) UTC = 7:00 AM EST
- 15:00 (3:00 PM) UTC = 10:00 AM EST
- 18:00 (6:00 PM) UTC = 1:00 PM EST
- 21:00 (9:00 PM) UTC = 4:00 PM EST

#### EDT - Summer Months

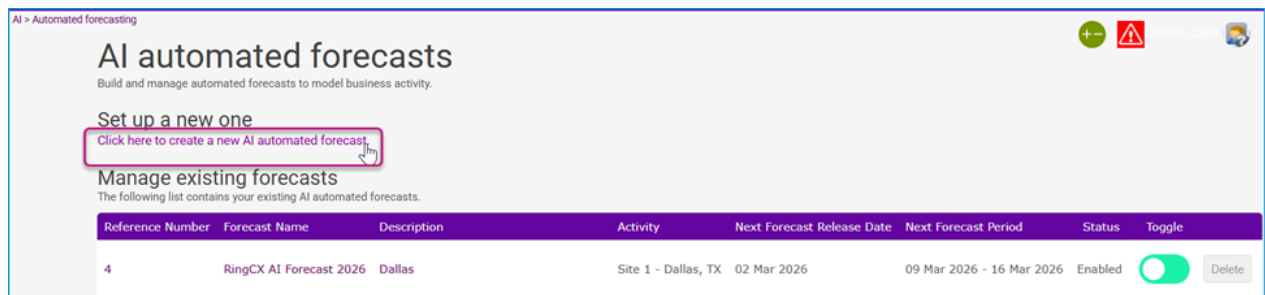
- 00:00 UTC = 8:00 PM EDT (Previous Day)
- 06:00 UTC = 2:00 AM EDT
- 12:00 (Noon) UTC = 8:00 AM EDT
- 15:00 (3:00 PM) UTC = 11:00 AM EDT
- 18:00 (6:00 PM) UTC = 2:00 PM EDT
- 21:00 (9:00 PM) UTC = 5:00 PM EDT

## Set up the AI forecast

Access the AI Forecasting feature through the AI main menu option. Select the submenu link *Automated forecasting* or *Set up automated AI Forecasts* in the tile.



[Manage existing automated forecasts](#) or [Click here to create a new AI automated forecast.](#)

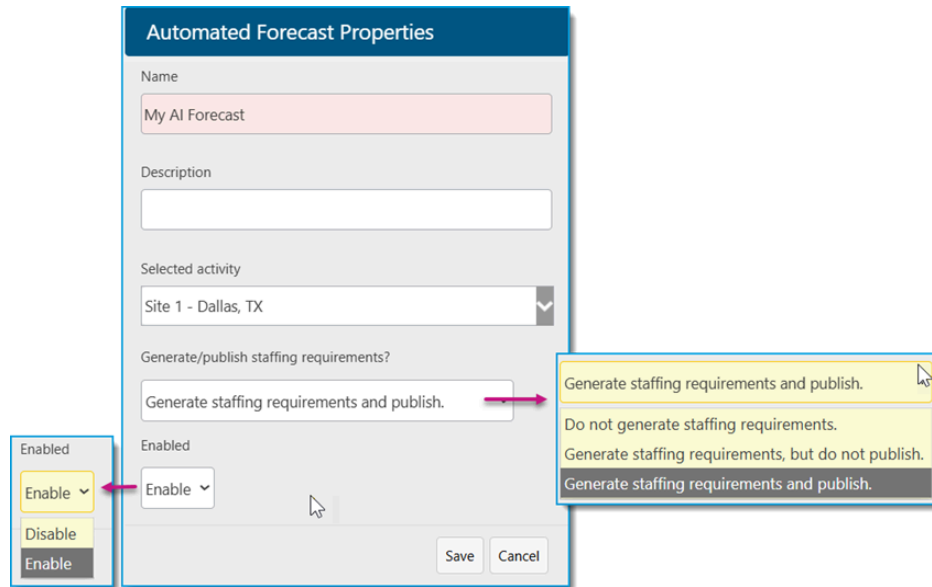


Follow the Steps to Success: Setup | Forecast recurrence | Machine learning.

## Setup > Basic properties

**Name:** Give your forecast a name and optional description.

**Selected activity:** Select an activity. A higher level with many included activities will take longer to run.



**Generate/publish staffing requirements?** Select whether to generate staffing requirements, and whether to publish staffing requirements.

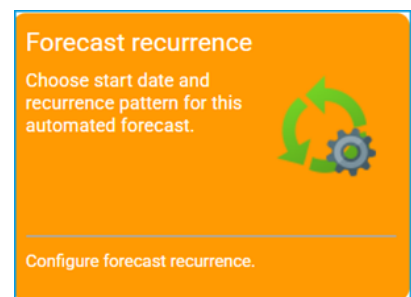
- **Do not generate staffing requirements.**
- **Generate staffing requirements, but do not publish:** This will create a working forecast with staffing requirements in Forecast > Working forecasts. You will need to manually publish the forecast before it will be available to use in a working schedule.
- **Generate staffing requirements and publish:** The staffing requirements are published and available to use in a working schedule.

**Enabled?** Select *Enable* to allow this AI forecast to run when scheduled.

Each time the service runs, it will create a new revision of this working forecast.

## Forecast recurrence

Parameters entered here determine how often and on what schedule the forecast will run, when the forecast starts after the release date, and how many days are included in the forecast.



**Next forecast release date:** The date the forecast data will be available. The forecast engine will use all historical data up to this date to create the forecast. This date must be in the future (tomorrow or later).

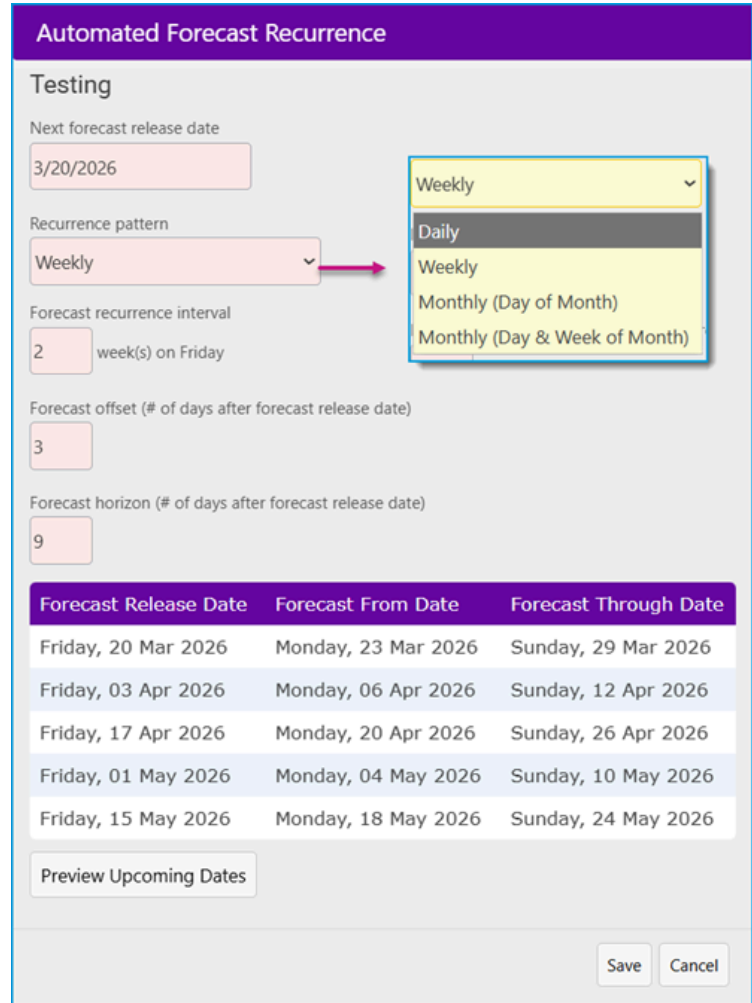
**Recurrence pattern:** Options include daily, weekly, monthly by day of month (e.g., on the 1<sup>st</sup> of the month), and monthly by day & week of month (e.g., every second Friday). The next options will change based on the selected recurrence pattern.

**Forecast recurrence interval:** Enter a frequency. The interval options are based on your selected recurrence pattern.

**Forecast offset (# of days after forecast release date):** Number of days after the release date to start the forecast. Must be between 1 and 15 days and less than the forecast horizon. For example, you may release a forecast on Friday that forecasts for dates starting on Monday (3 day offset).

**Forecast horizon (# of days after forecast release date):** Number of days after the release date to end the forecast. Must be 35 days or fewer and greater than the forecast offset.

**Preview Upcoming Dates:** Click to preview the next five forecast dates based on the selections.



**Automated Forecast Recurrence**

Testing

Next forecast release date: 3/20/2026

Recurrence pattern: Weekly

Forecast recurrence interval: 2 week(s) on Friday

Forecast offset (# of days after forecast release date): 3

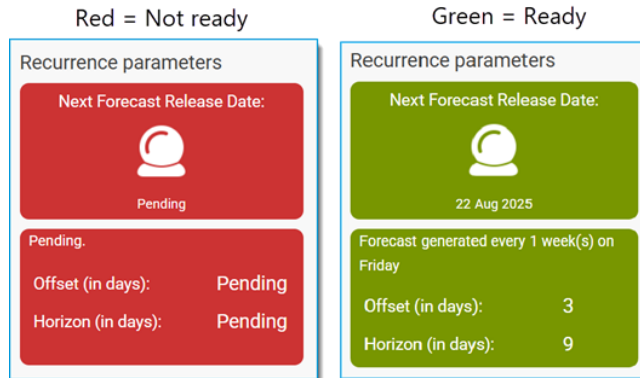
Forecast horizon (# of days after forecast release date): 9

Forecast Release Date	Forecast From Date	Forecast Through Date
Friday, 20 Mar 2026	Monday, 23 Mar 2026	Sunday, 29 Mar 2026
Friday, 03 Apr 2026	Monday, 06 Apr 2026	Sunday, 12 Apr 2026
Friday, 17 Apr 2026	Monday, 20 Apr 2026	Sunday, 26 Apr 2026
Friday, 01 May 2026	Monday, 04 May 2026	Sunday, 10 May 2026
Friday, 15 May 2026	Monday, 18 May 2026	Sunday, 24 May 2026

Preview Upcoming Dates

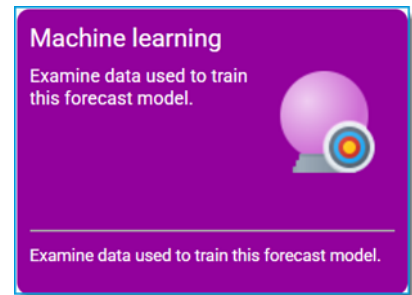
Save Cancel

When the recurrence parameters are complete, the tiles on the worksheet will turn green.



## Machine learning

Use the Automated Forecast Data Integrity Report to examine the forecast model data used to train this automated forecast.



- **Verify Dates:** Collecting more historical events improves seasonality predictions (yearly, monthly, weekly trends). Stale data could affect the prediction accuracy with possible uncertainty similar to starting over with no data.
- **Data Completeness:** Missing data not reported/collected will affect prediction accuracy.
- **Data Consistency:** Is any data outside the standard deviation for call volume/AHT?

Use the tiles at the top of the page to examine individual parts of the data in your model. Yellow flags indicate a higher degree of urgency or need for human review, but will not prevent running the forecast.

Activity	Earliest Event Time	Latest Event Time	Days Since Last Event	Zero Count	Non-Zero Count	Collection Intervals	Collection Percent	CV Average	CV Standard Deviation	AHT	AHT Standard Deviation
Billing	29 Dec 2025	27 Dec 2027	672	0	69888	69984	99.86	7	7.36	394	181.94
Customer Onboard Service	29 Dec 2025	27 Dec 2027	672	24544	45344	69984	99.86	1	1.18	112	126.38
New Customer Sales	29 Dec 2025	27 Dec 2027	672	936	68952	69984	99.86	5	4.75	177	89.85
Sales Chat	29 Dec 2025	27 Dec 2027	672	12480	18200	69927	43.87	0	0.57	441	684.6

### Verify Dates

This will be Valid / green if there are 365 days of data AND new data within the last 7 days. If **any** activities do not meet this criteria, the icon for Valid? will be yellow, but you can proceed.

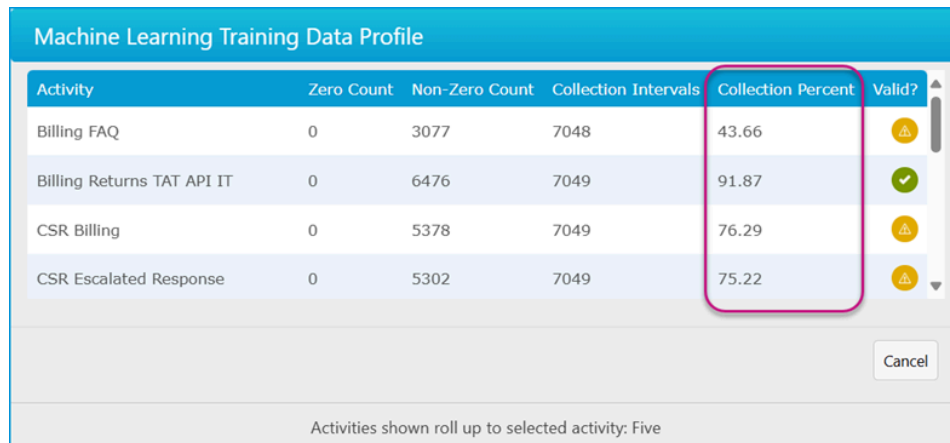


Activity	Earliest Event Time	Latest Event Time	Days Since Last Event	Valid?
Assistance Management API QA NOC	15 Jun 2025	13 Aug 2025	0	⚠
NOC General QA	15 Jun 2025	06 Aug 2025	7	⚠
QA B2B TTL ACD	15 Jun 2025	13 Aug 2025	0	⚠
QA Management Portal	15 Jun 2025	13 Aug 2025	0	⚠

Activities shown roll up to selected activity: QA

### Data Completeness

This is Valid / green if the Collection Percent is  $\geq 90$ . If **any** activities do not meet this threshold, the icon for Valid? will be yellow, but you can proceed.



Activity	Zero Count	Non-Zero Count	Collection Intervals	Collection Percent	Valid?
Billing FAQ	0	3077	7048	43.66	⚠
Billing Returns TAT API IT	0	6476	7049	91.87	✅
CSR Billing	0	5378	7049	76.29	⚠
CSR Escalated Response	0	5302	7049	75.22	⚠

Activities shown roll up to selected activity: Five

### Data Consistency

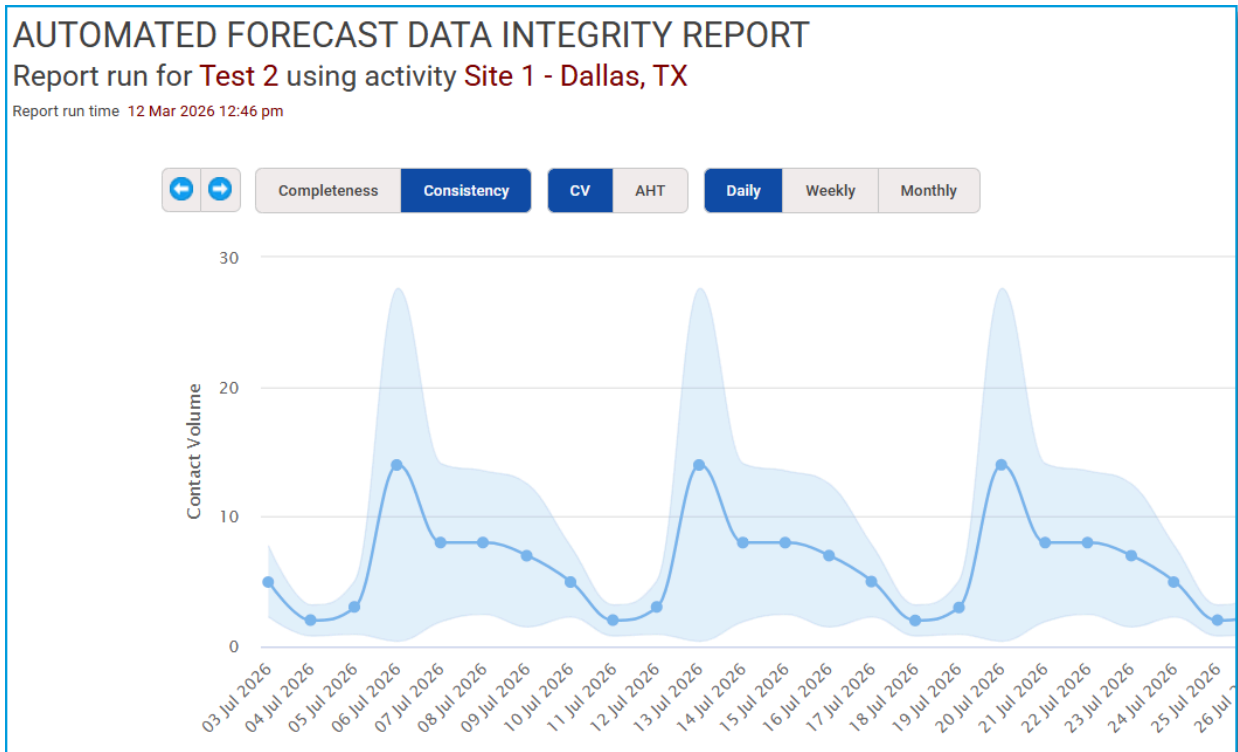
This is Valid / green if the contact volume relative standard deviation is  $\leq 30$  AND AHT relative standard deviation is  $\leq 30$ . If **any** activities do not meet this, the icon for Valid? will be yellow, but you can proceed.

Machine Learning Training Data Profile						
Activity	CV Average	CV Standard Deviation	AHT	AHT Standard Deviation	Valid?	
Assistance Management API QA NOC	1	1.76	80	107.52	✓	
NOC General QA	3	2.43	358	196.01	✓	
QA B2B TTL ACD	1	1.13	77	70.7	✓	
QA Management Portal	1	1.2	464	923.19	✓	

Cancel

Activities shown roll up to selected activity: QA

In this section you can view a graph of your call volume/AHT for an activity with an overlay of standard deviations. Click an activity name to generate the report and review the data. The wider the band in the graph, the more volatile your call volume/AHT for that interval. This allows you to identify areas of concern. As with many graphs, you can click and drag to zoom in on a date range.



**Overall** (available in version 26.01)

**Verify Dates**

Validate your data timestamp to avoid stagnant data and ensure enough historical data. ⚠

**Data Completeness**

Verify that your activity data does not have too many missing values. ⚠

**Data Consistency**

Ensure your activity data is consistent and does not have too many anomalous values. ✔

**Overall**

Ensure your activity data is consistent and does not have too many anomalous values. ⚠

Activity	Earliest Event Time	Latest Event Time	Days Since Last Event	Zero Count	Non-Zero Count	Collection Intervals	Collection Percent	CV Average	CV Standard Deviation	AHT	AHT Standard Deviation
Customer Onboard Service	29 Dec 2025	27 Dec 2027	655	24544	45344	69984	99.86	1	1.18	112	126.38
Sales Chat	29 Dec 2025	27 Dec 2027	655	12480	18200	69927	43.87	0	0.57	441	684.6
Sales Email	29 Dec 2025	27 Dec 2027	655	20800	47112	69984	97.04	1	1	528	691.85
Tier 1 support	29 Dec 2025	27 Dec 2027	655	39520	30368	69984	99.86	0	0.61	250	489.65

**Manage existing forecasts**

View a list of existing automated forecasts including the name, description, activity, next forecast release date, next forecast period, and the status (enabled or not). This is where you can enable or disable an automated forecast by clicking the toggle, or delete disabled forecasts (enabled forecasts cannot be deleted).

If the next forecast release date has *Pending further work*, dates have not been selected, and the forecast cannot be enabled. Click the name of the forecast to go to the setup page.

## AI automated forecasts

Build and manage automated forecasts to model business activity.

**Set up a new one**  
[Click here to create a new AI automated forecast.](#)

**Manage existing forecasts**  
The following list contains your existing AI automated forecasts.

Reference Number	Forecast Name	Description	Activity	Next Forecast Release Date	Next Forecast Period	Status	Toggle	Delete
6	Weekly forecast level 4		Four	Pending further work	Invalid date - Invalid date	Disabled	<input type="checkbox"/>	Delete
5	Monthly forecast level 5		Five	29 Aug 2025	01 Sep 2025 - 28 Sep 2025	Enabled	<input checked="" type="checkbox"/>	Delete
4	Weekly Forecast level 8		Eight	22 Aug 2025	25 Aug 2025 - 31 Aug 2025	Disabled	<input type="checkbox"/>	Delete

## Working Forecasts

When viewing the list of working forecasts (Forecast > Working forecasts), generated AI forecasts include the forecast description with the **forecast name**, **date generated**, **forecast dates**, and number of revisions.

### For example



Manage existing forecasts  
The following list contains your existing forecasts.

Reference Number	Forecast Description	Current Revision	Create Date	
8	Auto-forecast [Cathi's test] generated by Automated Forecast Service on Tuesday, 16 Sep 2025 12:47:25 AM for dates 08 Sep 2025 - 14 Sep 2025	12	9/5/2025 12:58:50 AM	Delete

Each time the service runs, it will create a new revision of this working forecast.

Click the forecast description to enter the working forecast worksheet.

**Review then publish the AI forecast.** If you selected *Generate staffing requirements and publish* in the AI forecast setup, you do not need to publish the forecast here.

The forecast is now available to use in a working schedule.

## Overview of AI Forecasting Flow

