A step-by-step guide to standard weekly and daily WFM tasks

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This document accompanies the CommunityWFM College webinar *Weekly and Daily WFM Tasks*. It includes additional details and reviews the standard weekly and daily tasks typically performed by WFM administrators.

Weekly Tasks—Forecasting & Scheduling

Best practice: Prior to forecasting, review the last 6 weeks of contact volume data at the activity level to look for trends: Report > Contact volume > Enterprise Model. This will confirm you are using the correct forecast profile when creating your forecast.

We recommend creating schedules for one week at a time / two weeks in advance.

This table will guide you through using historical data from your system to create accurate forecasts, then using this forecast data to create and publish optimized schedules for your agents. This assumes you have created forecast profiles (such as 4-week rolling or last 4 Monday holidays) and that agents have assigned activities and schedule templates.

	Create a Working Forecast
Create a working forecast	**1.** Go to Forecast > Working forecasts.
	2. Select *Click here to create a new forecast.*
	3. Give the forecast a descriptive name and *Save*.
or	**Use an existing Forecast Worksheet**
Navigate to an existing Forecast Worksheet	**1.** Go to Forecast > Working forecasts.
	2. Find and open the working forecast (likely the one with the greatest number of current revisions).
	3. Click the name of the working forecast to open the forecast worksheet.
Best practice Create one working forecast to use throughout the year. This is much more efficient and will help keep everything in one bucket. If you have 17 activities, you generate your CV and AHT all at once then revise individual activities, if needed.	

Working Forecast Contact Volume

Generate forecast data

This process generates the expected 15-minute interval call volume and average handle time for the date range, based on historical data.	**4.** In the navigation pane under Working Forecast Contact Volume, click *Generate forecast data.*
	5. Select the activity (site) and forecast dates—typically two weeks in advance, one week at a time. Click *Next.*
	6. Pick a forecast profile from the list. Click *Select* then *Next.*
	7. Click *Next* again.
	8. Click *Import data* then when finished click *Next.*
	9. Select *Classic Community Forecast.* Click *Next* then click *Next* again.
	10. Click *Generate forecast* and when complete click *Finish.*
Confirm and verify the forecast data.	**11.** Select *View forecast reports.* The report opens in a new browser window.
	12. Select the activity (site) and date range.
	13. Click *Apply options.*
	14. Review the contact volume and AHT results to confirm that there is data present and that it makes sense.
	15. When finished, close the window, and return to Forecast Worksheet.

Working Forecast Staffing Requirements

Generate clusters

This generates clusters for things like cross-training.	**16.** Remain on the working forecast worksheet. (Forecast > Working forecast > open the working forecast).
	17. In the navigation pane, click *Generate clusters* under Working Forecast Staffing Requirements.

	18. Leave drop-down as Agent activity assignments. Click *Generate clusters*.
	19. Click *Finish*.
Generate forecast	
This generates the agent staffing requirements at 15-minute intervals for the selected data range.	**20.** In the navigation pane, click *Generate forecast* under Working Forecast Staffing requirements.
	21. Select the activity/site and date range then click *Next*.
	22. Click *Next* to use the default service metrics from the Enterprise Model (EM).
	23. Click *Next* to include the defaults for shrinkage from the EM.
	24. The system generates the forecast data. When complete click *Finish*.
Confirm and verify the staffing requirements.	**25.** Click *View forecast reports* under Working Forecast Staffing requirements.
	26. Select the site and date range then click *Apply options*.
	27. Select the *Staffing Hours* tab in the report to view more data and verify the Total Adjusted FTEs.
	28. When finished, close the browser window to return to the Forecast worksheet.
Publish forecast data	
This publishes the forecast so the data can be used in creating schedules.	**29.** In the navigation pane, click *Publish forecast data* under Working Forecast Staffing requirements.
	30. Select the site and date range.
	31. Click *Publish Forecast* then click *Finish*.

Create the Working Schedule

Set up the basic properties of the new schedule.	**1.** Go to Schedule > Working schedules.
	2. Select *Click here to create new working schedules.* Unlike the working forecast, **create a new working schedule for each week**.
	3. Select the activity/site and enter a name. **Best practice**: include the schedule date in the name.
	4. Be sure the box is checked to automatically include a reference to this week's published forecast.
	5. Click *Next.*
Define the dates for the schedule.	**6.** Click on any day of the week within the week of your schedule. Community will select the entire week.
	7. Click *Next.*
	8. Click on the *From Date* or *Through Date* to open the schedule worksheet.

Schedule Worksheet

Note: No need to select or customize participants here (agents are already assigned to activities).

Add custom hours or closed dates	**9.** Though inherited from the EM, if your center will be closed or have adjusted hours on a day, select *Custom work habits & hours.* Uncheck any days when the center is closed. Be sure to *Save.*
Review time off requests from agents	**10.** Select *Review events and exceptions,* check to include events from the Published schedule, and *Apply options* to run the report.
	11. If necessary, approve, deny, or return to pending any agent requests. When finished, close the report window.
Select forecast data	**12.** Click *Select forecast data* in the tile or the navigation pane and verify that the date range matches the schedule you are creating.

Generate optimized schedules	**13.** Click *Generate optimized schedules* in the tile or the navigation pane.
	14. If there is a red stop symbol for any setting 🚫 you will need to fix the conflict before generating the schedule. A yellow triangle with an exclamation point ⚠ is a warning (e.g., there is an activity without an agent assigned) but you can continue. If you make changes, click *Re-verify Schedule* before proceeding.
	15. Click *Generate Schedule.*
	16. In the pop-up window click *Go.* The system will create schedules based on the published forecast. When complete, you'll see a green box with *Success.*
	17. Review the schedule metrics in the pop-up then close the window.
Manage agent schedules	**18.** Select *Manage agent schedules* in the navigation pane then click *Appy options* to run the report. **Pro tip:** If the schedule loads but the net line statistics at the top of the page never loads, you don't have a published forecast for that week.
	19. Review the schedule for each day and adjust if needed (e.g., add meetings and training). When finished, close the window.
Publish the Working Schedule	
Publish the schedule	**20.** Click *Publish this schedule* under Working Schedule Extras.
	21. In the pop-up window, add a required comment then click *Next.* **Best practice:** include the reasons for any major schedule adjustments.
	22. Review the table for errors (🚫) then click *Next.* If you see a 🚫, it means those activities already have an associated published schedule (e.g., when an agent has cross-training in > 1 activity), and you may need to unpublish those schedules first, then publish at the next higher level to cover the cross-training activities.

	23. When published, you'll see a confirmation message. Click *Finish*.

Agents will receive a notification that there is a new published schedule.

Note: If you need to adjust the schedule, be sure to make the edits in the **published** schedule (Schedule > Published schedule **OR** Report > Published schedule > Schedule details > Enterprise model) and not the working schedule.

Daily Tasks

Modify published schedules as needed

Keeping the published schedules up-to-date will be very important for ensuring accurate schedule adherence for agents, accurate headcount and reporting for administrators and historical shrinkage. To help update the published schedules, CommunityWFM offers 3 places where modify published schedules:

1. Schedule > Published Schedule > Interactive Schedule Reports > Agent Schedules by Activity
2. Report > Published Schedules > Schedule Details
3. Homepage > Weekly Schedule

Monitor contact center performance

- Report > Intraday Analysis > Intraday Performance Monitor report

This report can help identify intervals with under- or over-staffing. Once identified, you can adjust staff accordingly by offering overtime, canceling or scheduling meetings or trainings, offering voluntary time off (VTO), optimizing breaks/lunches, etc.). You can use the ASAP feature to efficiently accomplish many of these tasks.

Monitor adherence & attendance

Monitoring agent schedule adherence and attendance is necessary for keeping track of what everyone is doing, identifying potential issues, and rewarding desired behaviors. Options for monitoring adherence and attendance include—

1. Report > Schedule Adherence > Daily Schedule Adherence

   ** This report offers schedule editing and monitoring adherence. **

2. Homepage > Schedule Adherence Monitor
3. Homepage > Automated Schedule Attendance Monitor

Review Agent Time Off Requests

Will need to approve/deny new requests if the system is set up for them to go to a pending status. There are 3 places where you can approve / deny requests:

1. Homepage > Pending Request Worksheet.
2. Published Schedule Event Summary Report (Report > Published Event Summary. Go to the Show Event Details tab.
3. Settings > People & Agent Templates > People

   Go to Employee Profile/Time Off Settings/Pending & Upcoming Scheduled Time Off.

Review Agent Schedule Transactions (AKA Schedule Trade Requests)

- Homepage > Schedule Transactions > View Outstanding Schedule Transactions.

Monthly Tasks

Meeting with leadership

- Full Service Metric Summary report
- Shrinkage report
- Schedule adherence comparison report

Agent reviews

- Schedule Event Summary
- Shrinkage report
- Schedule Adherence Summary

ASAP options

Optimize breaks

Optimize meetings