



Forecasting & Scheduling for Holidays

Webinar handout
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phone 877-668-6870
web CommunityWFM.com

3400 Waterview Parkway, Suite 325
Richardson, Texas 75080

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About this Document

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

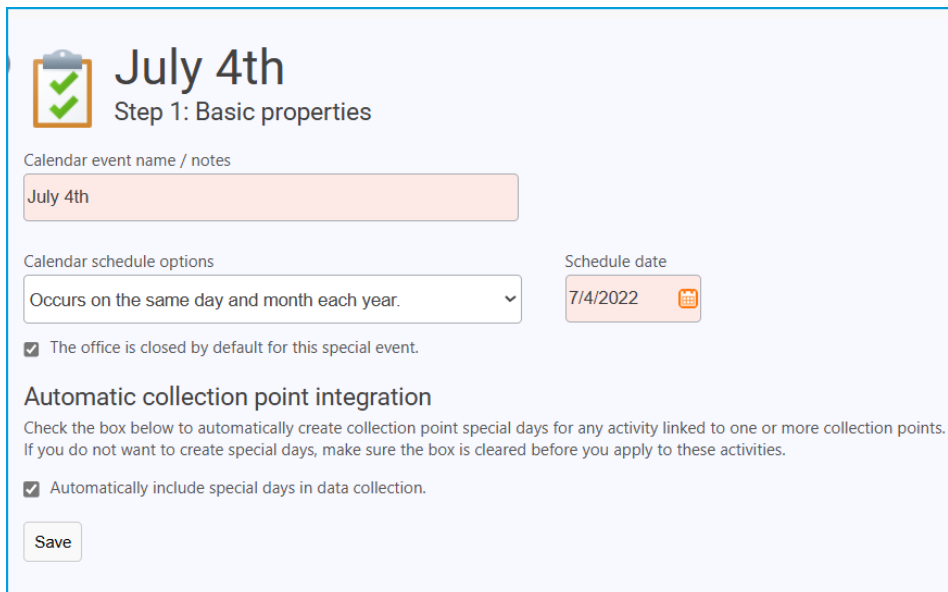
Special Calendar Events

Plan > Special calendar events

Special calendar events/days allow you to designate times when there is a change in your call volume/AHT that you want to consider when forecasting, and a way to indicate when the center is closed.

- May affect the forecast, depending on the forecast profile type.
- Can affect which days actual interval data is used when creating a forecast.
- Does not affect scheduling (except when indicating *Office is Closed by default*).
- Create these for holidays typically, but could be any day with expected abnormal volume.

Basic Properties



July 4th
Step 1: Basic properties

Calendar event name / notes
July 4th

Calendar schedule options
Occurs on the same day and month each year.

Schedule date
7/4/2022

The office is closed by default for this special event.

Automatic collection point integration
Check the box below to automatically create collection point special days for any activity linked to one or more collection points. If you do not want to create special days, make sure the box is cleared before you apply to these activities.

Automatically include special days in data collection.

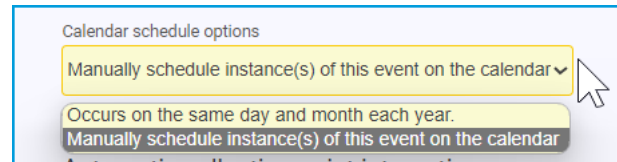
Save

Calendar event name / notes: Add a name and description.

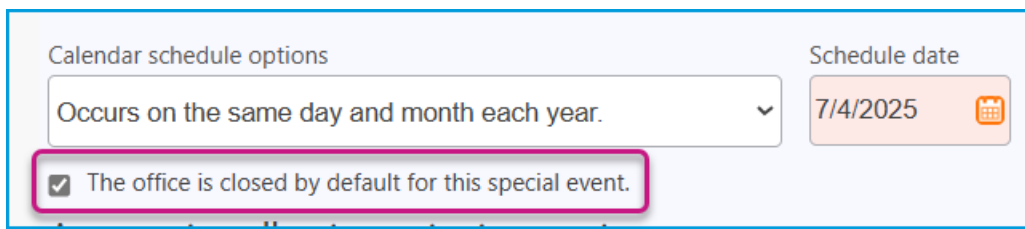


Calendar schedule options: From the dropdown select whether the event occurs on the same date every year (e.g., New Year’s Day) or you will manually select the day (Thanksgiving).

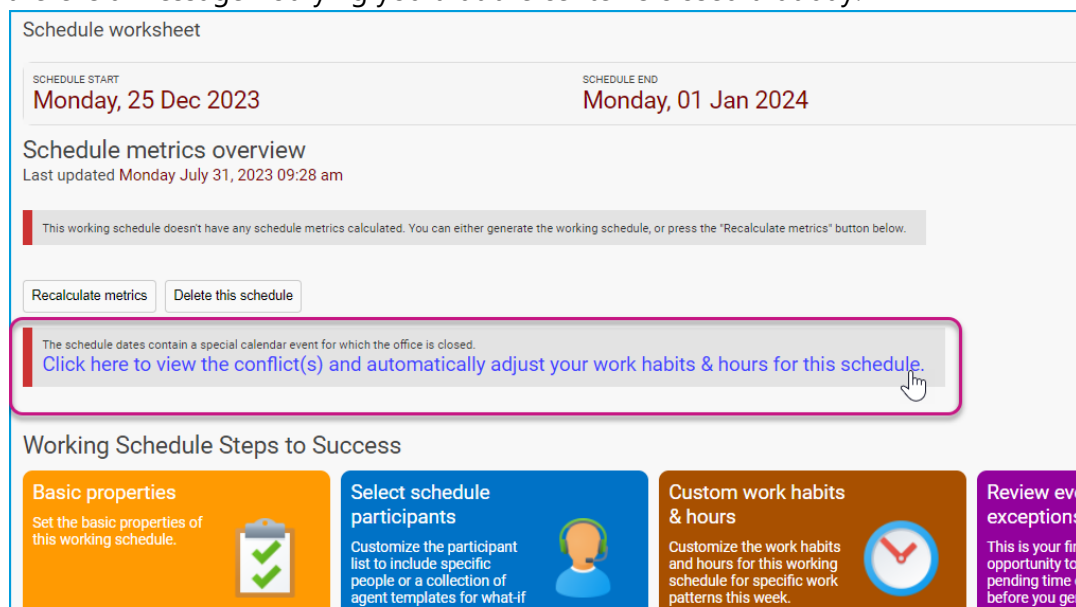
- Occurs on the same day and month each year:** Select the day in the calendar picker. Use this option when creating a single special calendar day or when the date is the same each year.
- Manually schedule instance(s) of this event on the calendar:** Use this option when selecting multiple days or when the day is on a different date each year (e.g., Thanksgiving, Labor Day). You’ll select the days in Step 3.



The office is closed by default for this special event: Check the box if the contact center is closed on this date or leave unchecked if it is open. If checked, the calendar will indicate that the center is closed.



When creating a working schedule that includes a special calendar day with this box checked, there is a message notifying you that the center is closed that day.





Clicking the link in the message opens a pop-up where you can adjust the work habits for that day.

Special calendar day conflicts

The following calendar special events occur during this schedule week.

Schedule fit	Required hours	Scheduled hours
Christmas	Monday	Cotharin, Todd

Cancel
Adjust work habits

If the center is closed, you would **not** include the next checkbox *Automatically include special days in data collection*.

Automatic collection point integration

Automatically include special days in data collection: Check the box to include special day(s) in data collection or leave unchecked to exclude the day(s) in data collection. Including the special day will create a data collection “exception” for all collection points associated with activities that are included in the special day definition. This means that when generating contact volume forecasts, it will automatically exclude those dates in the forecast.

Automatic collection point integration

Check the box below to automatically create collection point special days for any activity linked to one or more collection points. If you do not want to create special days, make sure the box is cleared before you apply to these activities.

Automatically include special days in data collection.

Save

Step 2: Associate Activities

Select the appropriate activities for this event. This allows you to include or exclude activities for the event. E.g., some departments are closed for a holiday, but other groups must work to cover for emergencies.

Click *Apply to activities*.



Step 3: Create instances of the Special Event

1. Select *Create Special Calendar Events* in the navigation pane.

If **Occurs on the same day and month each year**

2. **Number of instances:** How many years do you want to create?
3. Click *Create instances*.

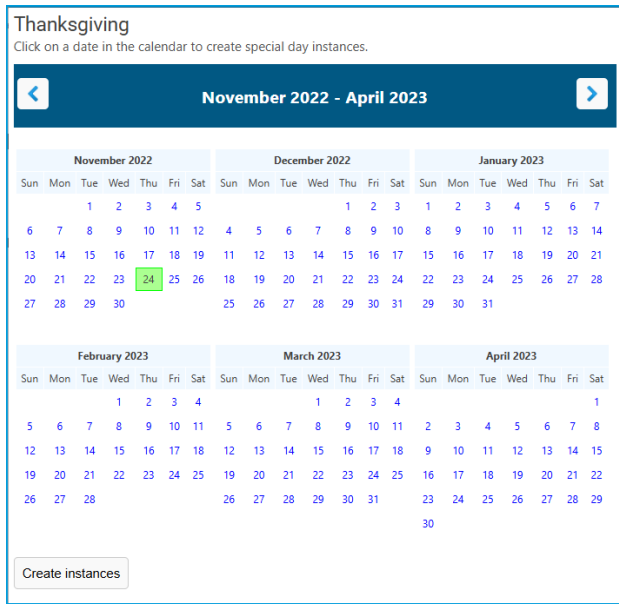
Calendar dates	Notes	Created on	
04 Jul 2022	Created by instance generator.	09 May 2025	Delete
04 Jul 2023	Created by instance generator.	09 May 2025	Delete
04 Jul 2024	Created by instance generator.	09 May 2025	Delete

If **Manually schedule instance(s) of this event on the calendar:**

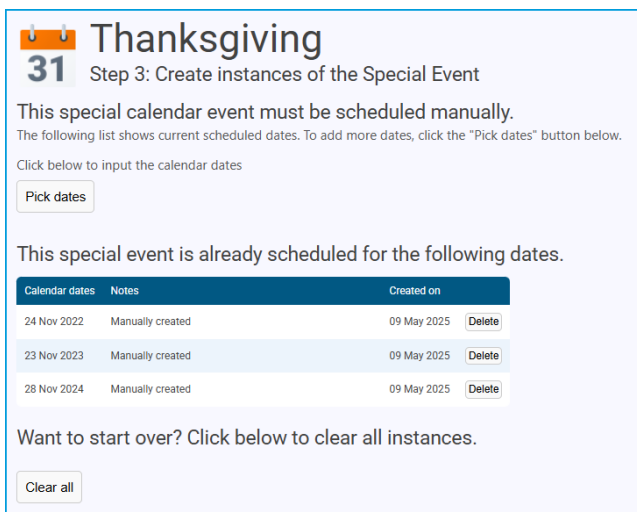
- Click *Pick dates* to open a calendar in a pop-up window.



- Go through the calendar and click to select all applicable dates for this event. When finished, click *Create instances*. When creating a forecast using special calendar days, the system will select the week with that date.



- View the list of selected dates. If necessary, you may delete individual dates or click *Clear all* to start over.



Display image

If desired, click *Display image* in the navigation pane then upload a file that will display on the calendar.

Show instances in a calendar view: Allows you to view scheduled days in calendar format.



Deleting a special calendar event

If you **uncheck** the box to *Automatically include special days in data collection* for a previously created special calendar event (in the basic properties), when deleting the event, you have the option to keep or remove future data collection points.

Leave existing data collection special days in place: This option will leave existing special days in the calendar but will not create any new days.

Remove existing data collection special days for future dates. This option will remove existing future special days in the calendar.

Modify collection exception sync option

You removed the collection point integration from this special event. What do you want to do with existing collection point special days?

Leave future collection exceptions for associated collection points.

Remove all future collection exceptions for associated collection points.

Special calendar events with advanced vacation

When creating a calendar partition, verify that you have configured any special calendar events (e.g., holidays when the contact center is closed) prior to creating the calendar partition rules. These events can then be applied in the rules of the calendar partitions. You can't create events directly in the calendar partition rules, so complete these before setting up the partitions.



Special Days

Creating a special day

Navigate to Settings > Data sources and select your data source.

Select *Show the setup options dialog* in the Setup options tile.



Select *Collection Points*.

Setup options

- Basic Properties**
Set up the basic properties for this data source, including friendly name and data collection interval.
- Connections**
Set up the connections to the underlying data source for historical and real-time data collection.
- Collection Points**
Set up the collection points (queues, skills, etc.) that you are interested in reporting from this data source.
- Device States**
Set up the device states used in real-time adherence reporting.
- Security**
Establish access permissions to restrict access to this data source.

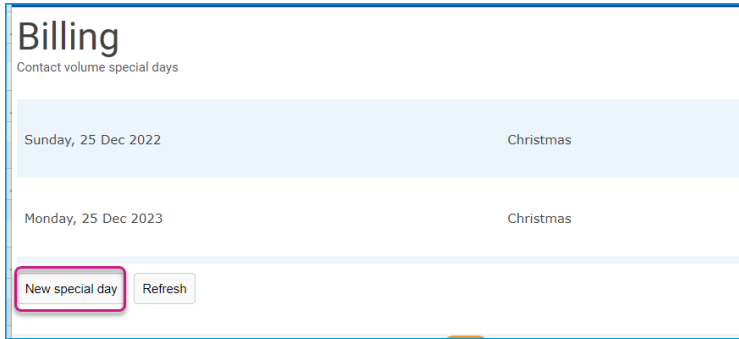
Cancel

For the activity, select *Add/remove special days*.

Configure collection points				
Id	Device id	Friendly name	Description	Active?
39	Billing	Billing	Billing	<input checked="" type="checkbox"/>
Add/remove special days				
2	Developer support	Developer support	Developer support	<input checked="" type="checkbox"/>

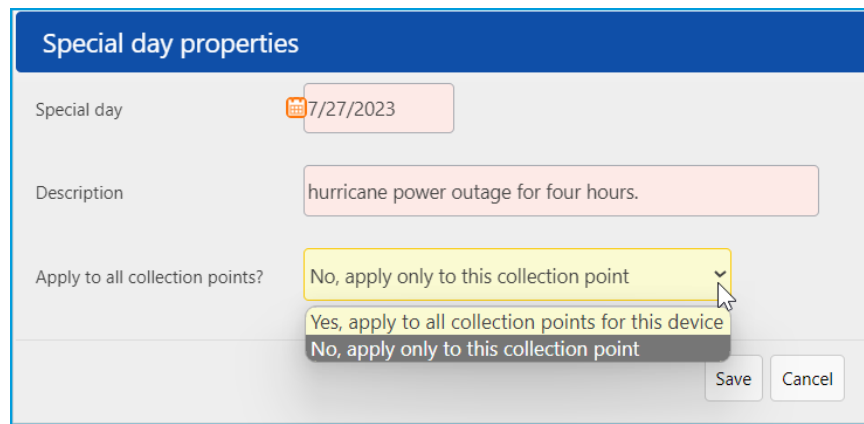


At the bottom of the pop-up window, select *New special day*.



Select the date for the special day, provide a description, and indicate whether the day should apply to all collection points or only this collection point.

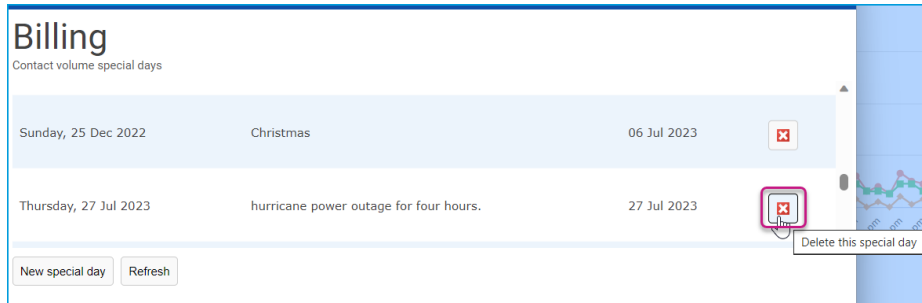
Click *Save*.



If a day is marked as a special day, CommunityWFM will not use the interval volumes and AHTs from that day when creating a forecast. This can be helpful when creating a forecast for a holiday or other special day.

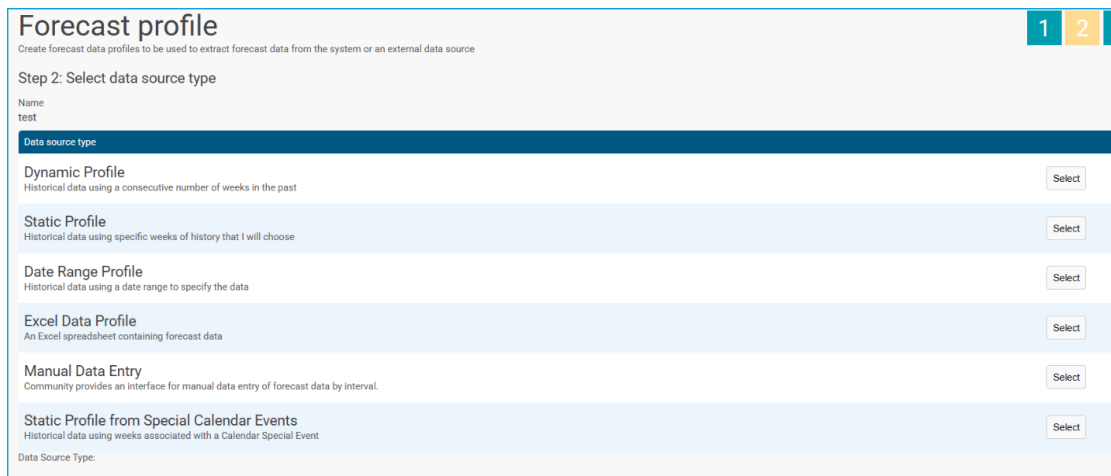
Deleting a special day

Navigate to the list of special days and click the red X. You cannot **edit** a special day here.



Forecast profiles

Forecast > Forecast profiles



Dynamic Profile

- Can use this profile but need to revise the forecast afterwards.
- This is the option to use if you don't have any past data for the holiday or if you believe this year's holiday will be completely different from the past holidays.

Static Profile

- Manually choose nonconsecutive weeks from the past.
- Can choose past weeks with the holiday you're forecasting for (same result as static profile from special days).



Date Range Profile

- Choose the past date range of data to use to create your forecast.
- Chosen date range does NOT have to be full weeks.
- Good to use if past holiday's data follows a different pattern than complete week.

Excel Data Profile

- Use data from an Excel file to create forecast (forecasted numbers will exactly match the spreadsheet).
- Good option if you don't have interval data for the past holiday in your current data source.

Manual Data Entry

- Good option if you have no past interval data at all for the past holiday but you have daily totals.
- The forecast will exactly match the numbers you enter here.

Static Profile from Special Calendar Events

- Uses a special calendar event (using the past dates defined in the event).
- Uses the interval data (CV and AHT) from the entire week containing a special calendar event.
- Can include several past special events in a profile (good for smoothing sharp peaks or dips in interval volume or AHT).
- Good option if you have data from past holidays.

Creating a forecast profile from special calendar events

STEP-BY-STEP

Forecast > Forecast profiles

1. Select *Click here to create a new forecast profile*.

Step 1: Basic properties

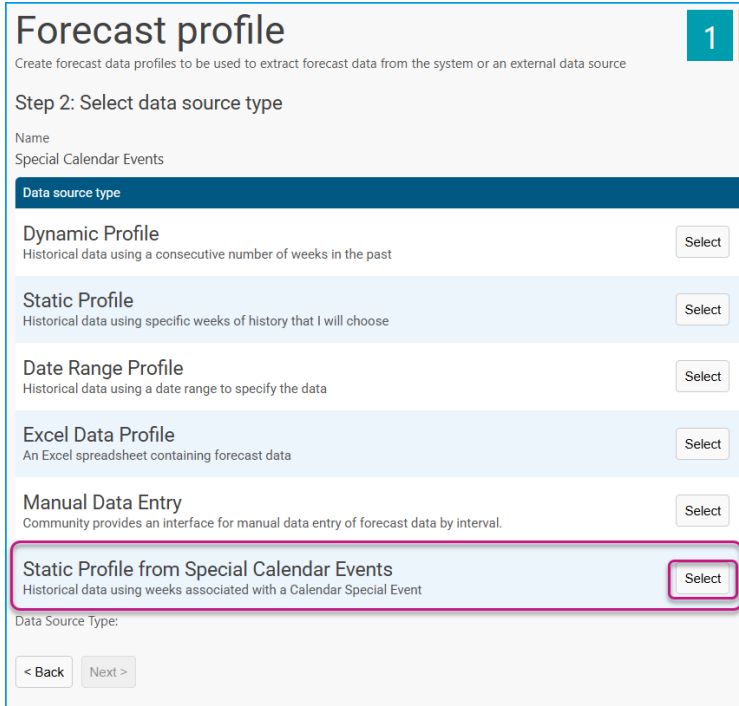
2. Give it a name. Description is optional.
3. *Use this profile for quick forecasting?* Typically, *No* since this reflects days that are special and not routine.
4. *This profile will contain what type of data?* Select *Contact volume* or *Shrinkage percentage*.



- Click *Next*.

Step 2: Select data source type

- Click *Select* in the Static Profile from Special Calendar Events row.



Forecast profile 1

Create forecast data profiles to be used to extract forecast data from the system or an external data source

Step 2: Select data source type

Name
Special Calendar Events

Data source type

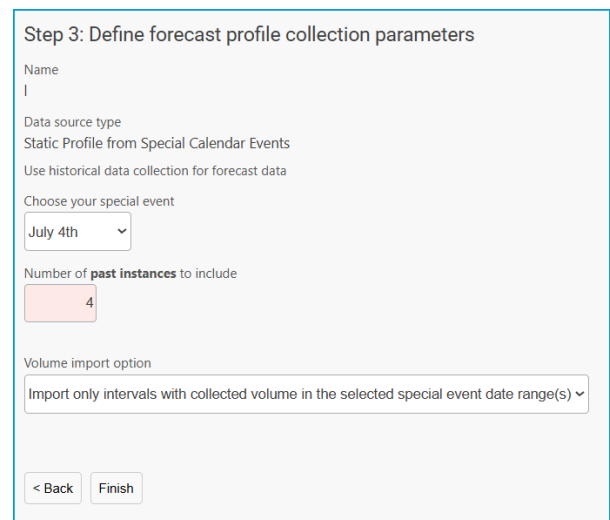
- Dynamic Profile**
Historical data using a consecutive number of weeks in the past Select
- Static Profile**
Historical data using specific weeks of history that I will choose Select
- Date Range Profile**
Historical data using a date range to specify the data Select
- Excel Data Profile**
An Excel spreadsheet containing forecast data Select
- Manual Data Entry**
Community provides an interface for manual data entry of forecast data by interval. Select
- Static Profile from Special Calendar Events**
Historical data using weeks associated with a Calendar Special Event Select

Data Source Type:

< Back Next >

Step 3: Define forecast profile collection parameters

- Select from the *Choose your special event* dropdown.
- Enter the number of past weeks with the special event to include. The default is 4. When creating a forecast, the system will go back and find this number of instances of the special calendar event to include in the forecast.
- Volume import option:** Select whether to import all intervals in the special event date range selected or only those with collected volume.
- Click *Finish*



Step 3: Define forecast profile collection parameters

Name
|

Data source type
Static Profile from Special Calendar Events
Use historical data collection for forecast data

Choose your special event
July 4th

Number of **past instances** to include
4

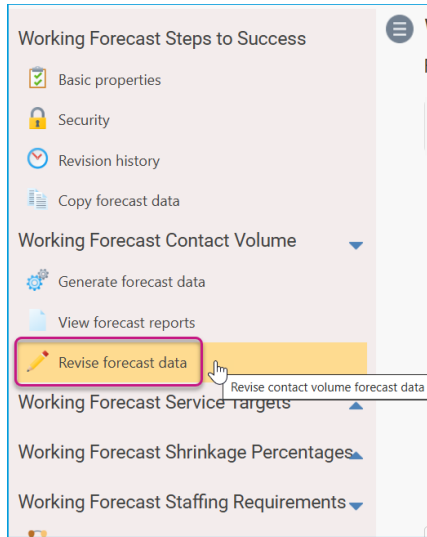
Volume import option
Import only intervals with collected volume in the selected special event date range(s)

< Back Finish

Revising forecasts

Revise a Working Forecast

1. Create a working forecast for contact volume and AHT for the holiday week.
2. Go to Revise Forecast Data.



Selected activity: Can choose a site, activity, or the enterprise model.

Change description: Make it specific so you'll know what it's for later.

Revise data from / through: Enter appropriate dates.

Select revision summary:

- Adjust each time interval individually (if changing 15-minute level numbers).
- Adjust daily totals for each date. Choose this to zero out a day or adjust a full day such as a holiday when the center is closed.
- Adjust weekly totals for each date.
- Adjust monthly totals.

Time zone selection: Options are default, corporate, or select from a list.

Revise forecast data

Step 1: Basic properties

Revise forecast data for **Working Forecast 2025**

Selected activity
Community Enterprise Model

Change description
Good Friday

Revise data from
4/14/2025

Revise data through
4/20/2025




Select revision summary
 Adjust each *time interval* individually
 Adjust the *daily totals* for each date
 Adjust the *weekly totals* for each date
 Adjust the *monthly totals* for each month in the date range.

Time zone selection
Use my default time zone



Next >




Click the pencil to make revisions.

Summary interval	Forecasted contacts	Contacts adjustment	Contacts adjustment method	Forecasted handle time	AHT adjustment	Handle time adjustment method	
Thursday, 03 Apr 2025 12:00 AM	5	<input type="text" value="0"/>	Percent Adjustment ▾	456.40	<input type="text" value="0"/>	Percent Adjustment ▾	
Thursday, 03 Apr 2025 12:15 AM	3	<input type="text" value="0"/>	Percent Adjustment ▾	457.33	<input type="text" value="0"/>	Percent Adjustment ▾	
Thursday, 03 Apr 2025 12:30 AM	6	<input type="text" value="0"/>	Percent Adjustment ▾	299.67	<input type="text" value="0"/>	Percent Adjustment ▾	

Adjust volume or AHT or both. For each that you revise, choose the adjustment method (Percent Adjustment or Value Adjustment).





Summary interval	Forecasted contacts	Contacts adjustment	Contacts adjustment method	Forecasted handle time	AHT adjustment	Handle time adjustment method	
Thursday, 03 Apr 2025 12:00 AM	5	<input type="text" value="-10"/>	Percent Adjustment ▾	456.40	<input type="text" value="-300"/>	Value Adjustment ▾	 

To zero out an interval or day, choose Percent Adjustment for the contact adjustment method and enter -100 in the contact adjustment field (minus 100).




For each row click *Save* icon  when finished.

If you need to remove a revision, go to *Revision history* in the navigation pane to view a list of revisions. Delete the revision and the initial forecast will be restored.

Working Forecast Steps to Success

-  Basic properties
-  Security
-  **Revision history**
-  Copy forecast data

Working Forecast Contact Volume ▾

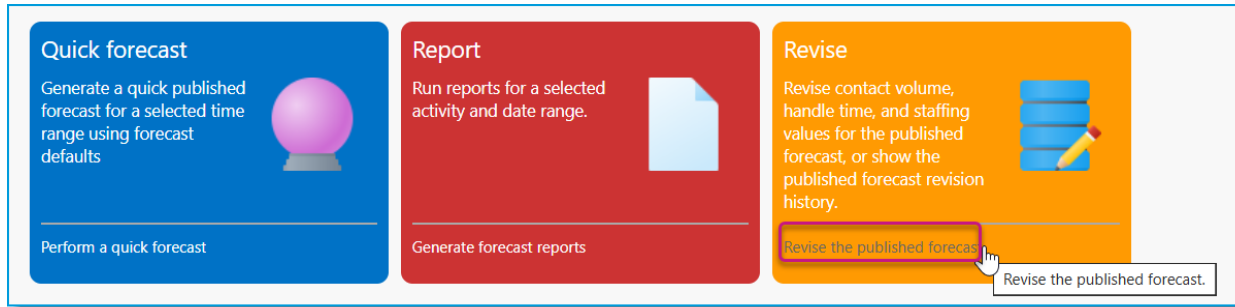
-  Generate forecast data
-  View forecast reports
-  Revise forecast data

Revise a Published Forecast

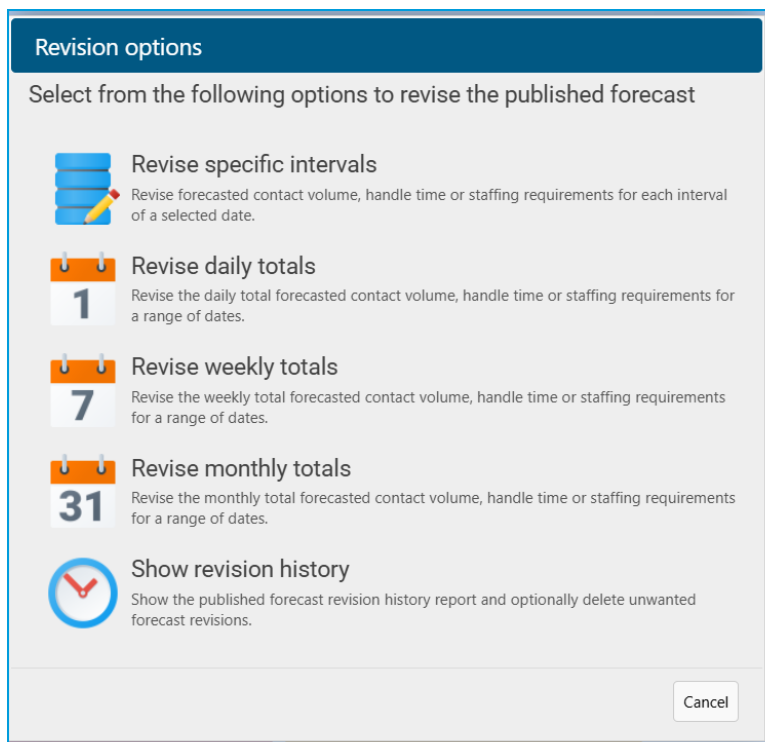
Navigate to Forecast > Published forecast.



Select *Revise the published forecast* in the Revise tile.



The options are the same as for a working forecast.



Note: When revising a published forecast, the only option is to make revisions for one activity at a time. There is no option to revise the whole Enterprise Model as you can in the working forecast.



Creating Schedules for a Holiday Week

Use this option if everyone is working their same schedule but not working on the holiday or working shorter hours, or if you want to offer different shifts for the holiday using an ASAP for OT.

1. Navigate to Schedule > Working Schedules.
2. Select *Click here to create new working schedules*.
3. Select the activity/site and enter a name.
Best practice: include the schedule date in the name.
4. Choose whether to use the published forecast or you may select a working forecast later.
5. Click *Next*.

New schedules

Step 1: Enter basic schedule properties

Apply to the selected activity

Site 1 - Dallas, TX

Name

Week of 4/7/2025

Description

Automatically include a reference to this week's published forecast

[Next >](#)

6. Click on any day of the week within the week of your schedule. CommunityWFM will select the entire week.

New schedules

Step 2: Select one or more schedule weeks

Click on a date in the calendar to create a working schedule for that week

April 2025 - June 2025

April 2025							May 2025							June 2025						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8
14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15
21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
28	29	30	1	2	3	4	26	27	28	29	30	31	1	23	24	25	26	27	28	29
														30	1	2	3	4	5	6

Valid?	Number	Week From	Week Thru
<input checked="" type="checkbox"/>	1	Monday, 07 April 2025	Sunday, 13 April 2025

[Next >](#)

7. Click *Next*.
8. Click on the *From Date* or *Through Date* to open the schedule worksheet.



9. In the navigation pane of the schedule worksheet, click *Custom work habits & hours*.

SCHEDULE START
Monday, 07 Apr 2025
SCHEDULE END
Sunday, 13 Apr 2025
PARTICIPANTS
0

Eligible activities

- ▶ Site 1 - Dallas, TX
 - ▶ Customer Program Service
 - Billing
 - Customer Onboard Service
 - New Customer Sales
 - Outbound
 - Tier 1 support
 - ▶ Multimedia Sales
 - Sales Chat
 - Sales Email

Set work habits & hours - Site 1 - Dallas, TX

No Work Habits & Hours are established for this Activity / Schedule. The values shown below are inherited from Community Enterprise Model on the Enterprise Model.

Work Day?	Day	Open From	Open Thru
<input checked="" type="checkbox"/>	Monday	-- Any Time --	-- Any Time --
<input checked="" type="checkbox"/>	Tuesday	-- Any Time --	-- Any Time --
<input checked="" type="checkbox"/>	Wednesday	-- Any Time --	-- Any Time --
<input checked="" type="checkbox"/>	Thursday	-- Any Time --	-- Any Time --

10. Select the site or activity that is closed on the holiday.

11. Uncheck the day of week in the Work Day? column that the center is closed. If you're open on the holiday but have different hours, leave the box checked and fill in the appropriate hours.

12. Click *Save* when done.

Scheduling alternatives

Schedule / Agent Templates

Use different schedule templates and agent templates then manually assign agents to the schedules.

- Use if everyone is working a different schedule for the holiday week.

Shift bid for holidays

- Not as common but could do this if you wanted to give higher ranked agents first dibs on holiday week schedules.

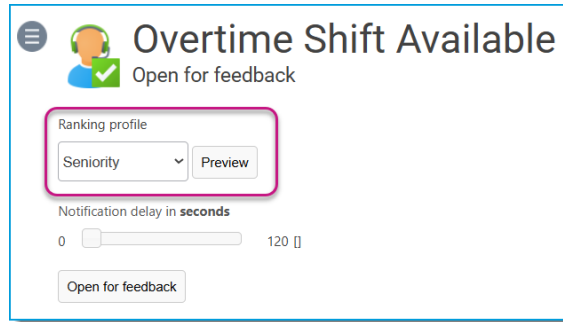
ASAPs

Use an ASAP to offer holiday shifts. Agents could work their normal schedule the rest of the week and volunteer for a different schedule on the holiday.

- Create overtime shifts (one ASAP for each if multiple shifts). **Note:** you would need to keep track of who has volunteered for what shift and only offer it to each agent one time OR tell the agents to only volunteer for one type of shift.



- Consider creating a 'holiday' work type event, especially if agents receive holiday pay.
- Can use a ranking profile to offer the holiday shifts to higher ranked agents first.



What's the difference between special calendar **events** and special **days**?

A special **day** can stand alone but can only reference one or all data sources on a single day. A special calendar **event** can reference one, or many, or all data sources and can apply to more than one day.