CommunityWFM

Forecast Profiles

Webinar handout
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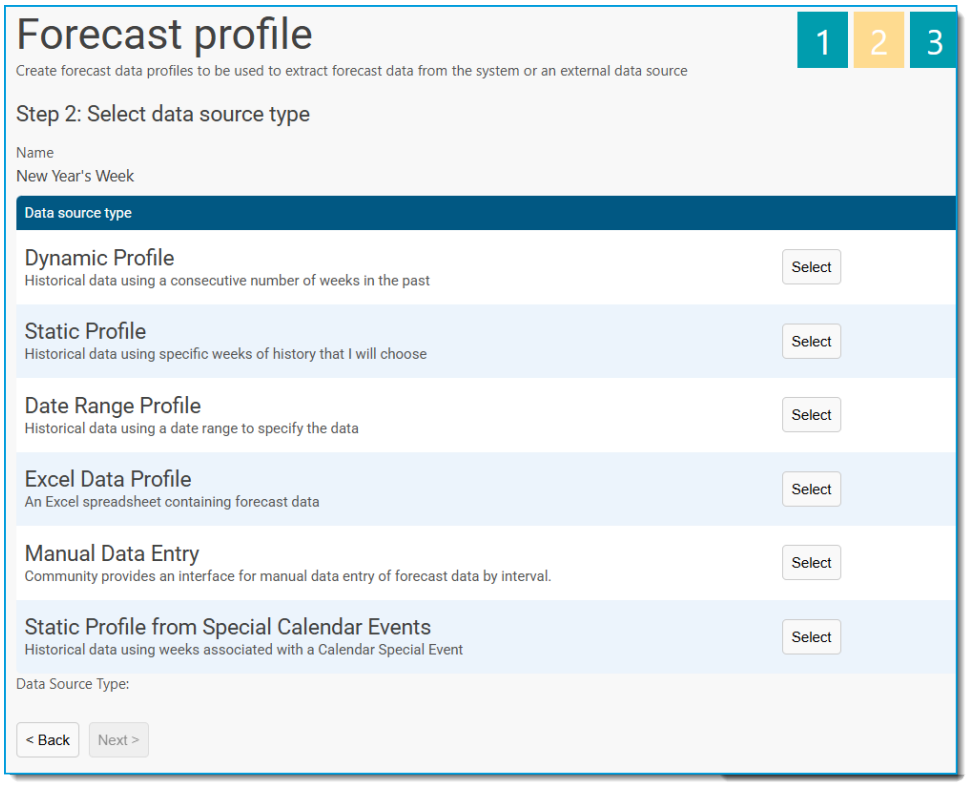
Forecast profiles

A forecast profile is a data-based scenario that references a specific set of historical data to use for forecasting purposes. For example, look at next week's date set from the same week last year and the year before, then use that historical data to create a forecast for this year.
Or use a rolling 4-week forecast, which is always the last 4 full weeks of data.

You can create as many forecast profiles as you need to cover any variety of situations.
Remember: Only one of these profiles may be designated as the default for performing a Quick Forecast.

There are six types of forecast profiles in the Enterprise version of CommunityWFM.



1. **Dynamic Profile** is a profile that uses a consecutive number of weeks. You tell the system how many weeks to use. When running a dynamic forecast, it will look at today's date and look at the designated number of previous completed weeks to create a forecast based on that historical data.
2. **Static Profile** presents a calendar where you select the specific weeks that you want to include in your forecast. You're specifically telling the system which weeks to use, and it will always use the selected weeks (unless you manually change it).
3. **Date Range Profile** is what it sounds like. You put in a start date and an end date and those are the dates of historical data CommunityWFM uses to create the forecast.

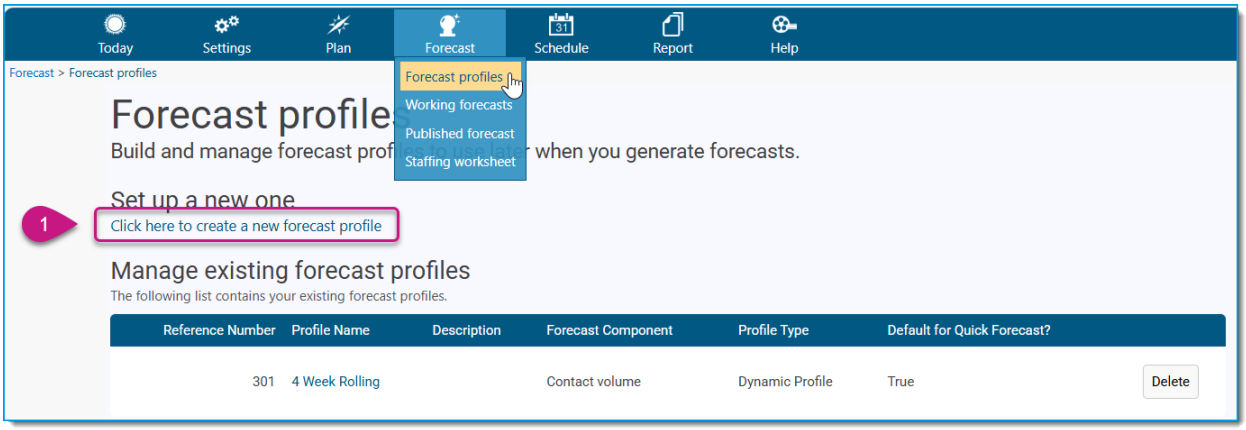
4. **Excel Data** and 5. **Manual Data Entry** are used when you don't have a data feed for the line(s) of businesses for which you are forecasting. Email is an example of data that you would enter manually because it is not typically captured with a traditional ACD.
   With an **Excel Data profile**, you create an Excel spreadsheet (formatted to match the requirements of the system) and upload the data.
   With a **Manual Data Entry profile,** you must add data for each interval for each activity.
6. **Static profile from special calendar events** allows selecting previously created Special Calendar Events that comprise predetermined historical data week selections. For Example, "Last 4 Christmas Weeks."

The **Essentials** version of CommunityWFM includes only Dynamic and Static profiles.

Create a new forecast profile

Navigate to Forecast > Forecast profile

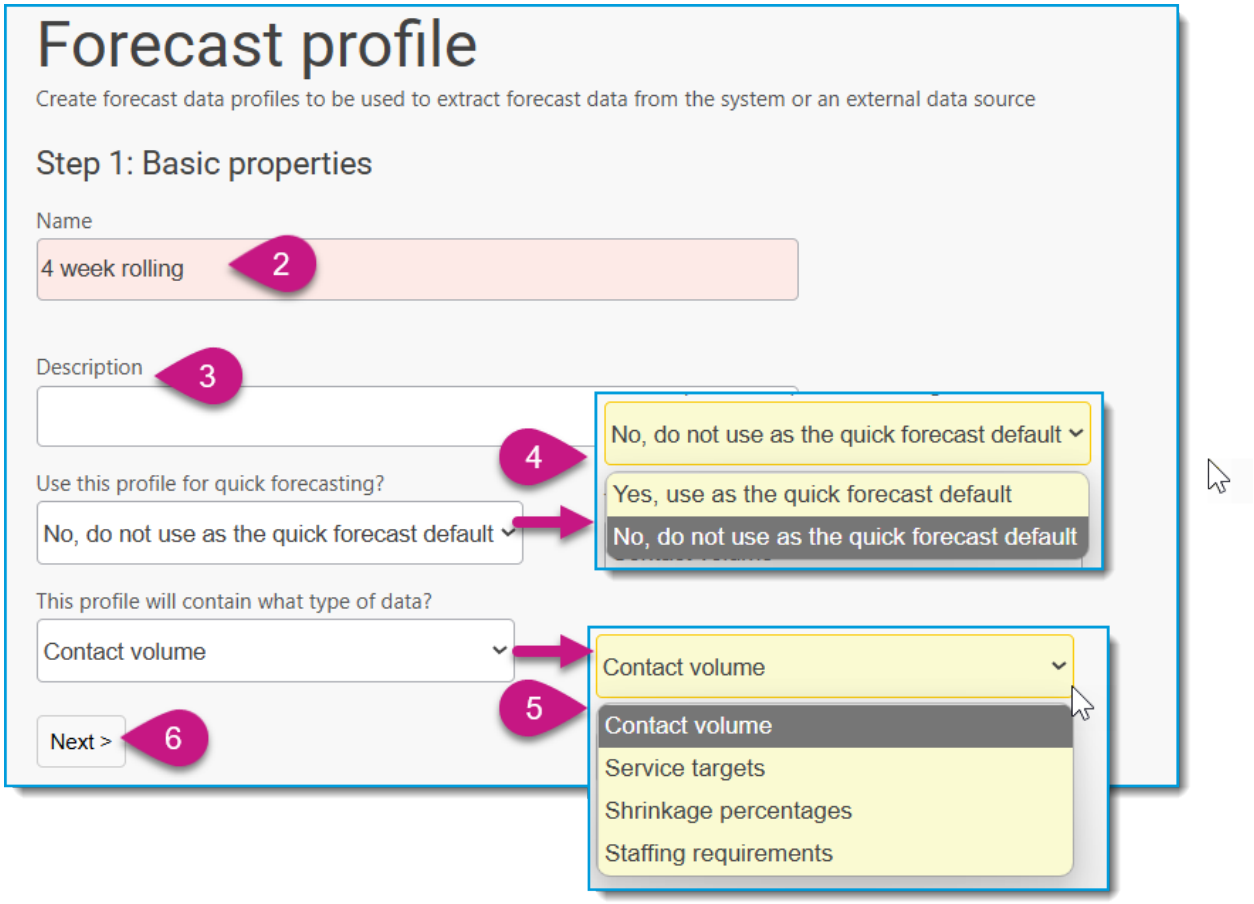
1. Select *Click here to create a new forecast profile.*



Step 1: Basic properties

2. **Name** is required. Best practice is to be descriptive (e.g., 4-week rolling).
3. **Description:** Optional.
4. **Use this profile for quick forecasting?** Only one profile may be designated for quick forecasting. The Published forecast page (Forecast > Published forecast) includes the option to run a quick forecast for a selected date range.
5. **This profile will contain what type of data?** Select *Contact volume, Service targets, Shrinkage percentage,* or *Staffing requirements.* Once selected you cannot go back and change this setting.

6. Click *Next.*



Dynamic profile

You can choose up to 99 weeks and it will average the volumes into 1 week of data.

Step 2: Select forecast profile type

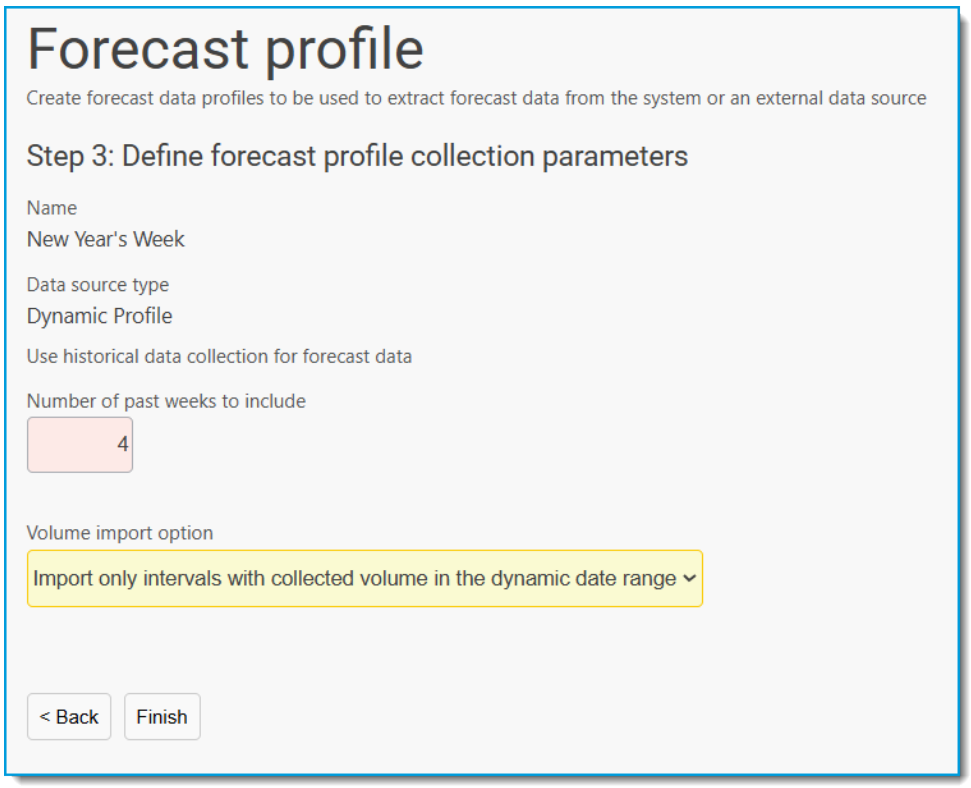
Click *Select* in the *Dynamic Profile* row. Once selected you cannot go back and change this setting.

Step 3: Define forecast profile collection parameters

Indicate number of past weeks to include (4 is the default; maximum is 99).

Volume import option: Either *Import all intervals in the dynamic date range,* or *Import only intervals with collected volume in the dynamic date range* (preferred). If selecting **all** intervals—including those without volume (days or intervals with 0)—it could skew the averaging making the forecast less accurate.

Click *Finish*.



Static profile

You can choose nonconsecutive or consecutive weeks to include, but it will select full weeks.

Step 2: Select forecast profile type

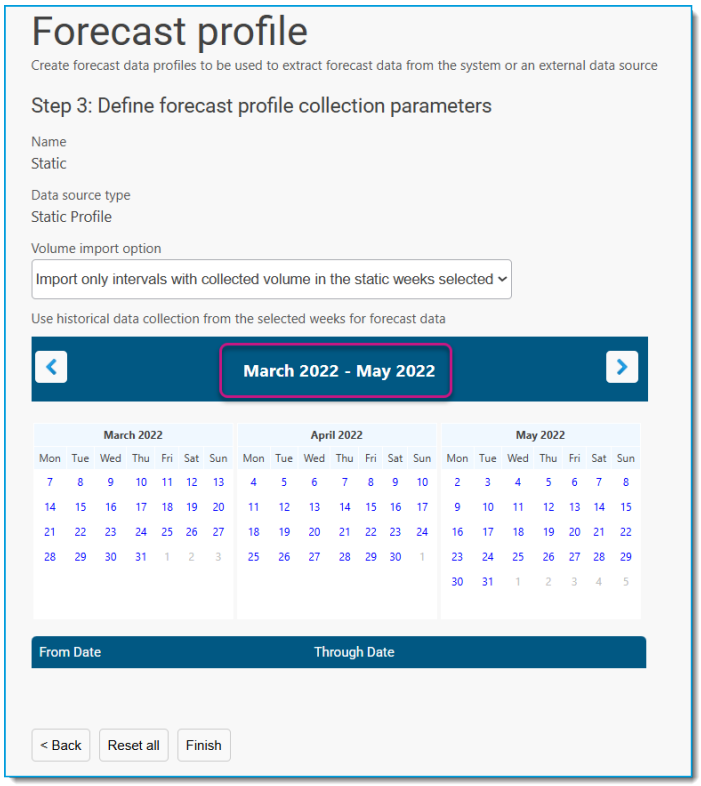
Click *Select* in the Static Profile row. Once selected, you cannot go back and change this setting.

Step 3: Define forecast profile collection parameters

Volume import option: Select whether to import all intervals in the static weeks selected or only those with collected volumes (preferred). If selecting **all** intervals—including those without volume (days or intervals with 0)—it could skew the averaging making the forecast less accurate.

Select from the calendar the week(s), consecutive or not, to use in the forecast. The calendar defaults to several years ago so you can pick weeks from the past. Clicking any date in the calendar will automatically select the entire week. If selecting more than one week, CommunityWFM provides an average of those weeks. Use as many relevant weeks as possible in the profile for smoothing purposes.
Because the forecasting algorithm averages the data for a given day down to the activity and 15-minute interval, you will want to select, at a minimum, 2 weeks of historical data.

Click *Finish*.



Date range profile

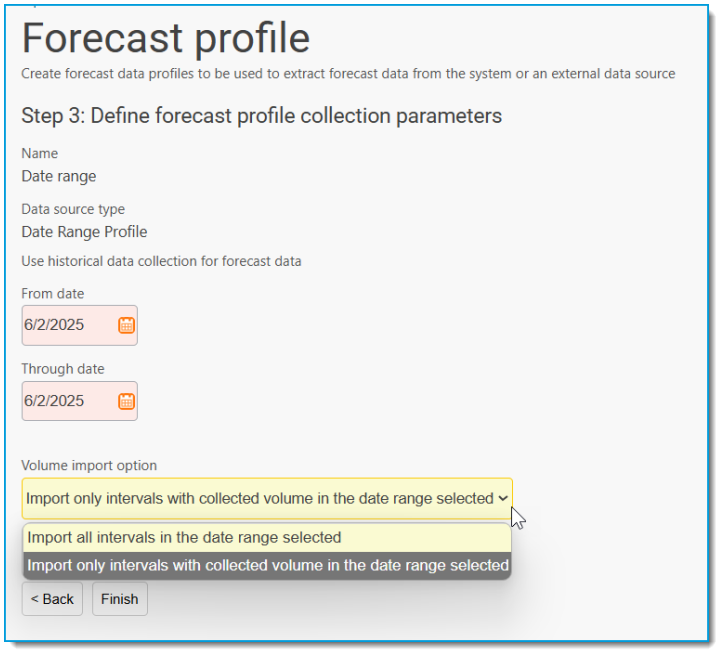
You can choose a date range of consecutive days – doesn't have to be full weeks.

Step 2: Select forecast profile type

Click *Select* in the Date Range Profile row. Once selected you cannot go back and change this setting.

Step 3: Define forecast profile collection parameters

Enter the ***From date*** and ***Through date*** for the profile.



Volume import option: Select whether to import all intervals in the static weeks selected or only those with collected volume (preferred). If selecting **all** intervals—including those without volume (days or intervals with 0)—it could skew the averaging making the forecast less accurate.

Click *Finish*.

Excel data profile

This is typically used when there isn't an ACD providing data.

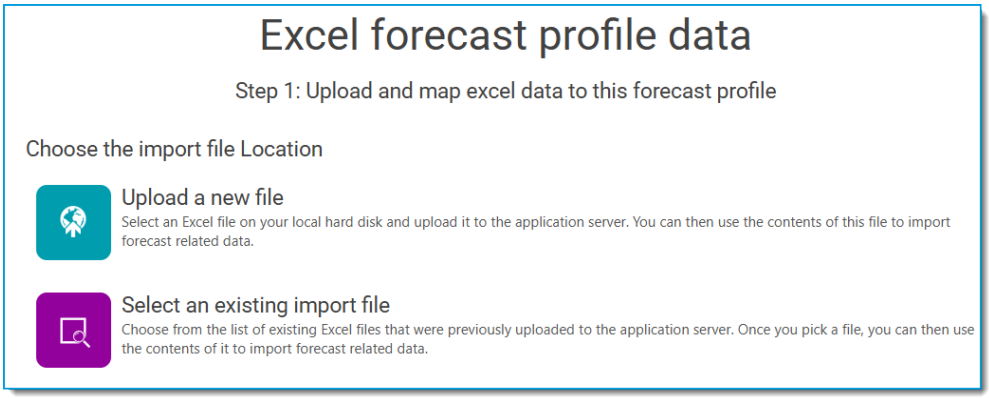
Step 2: Select forecast profile type

Click *Select* in the Excel Data Profile row. Once selected you cannot go back and change this setting.

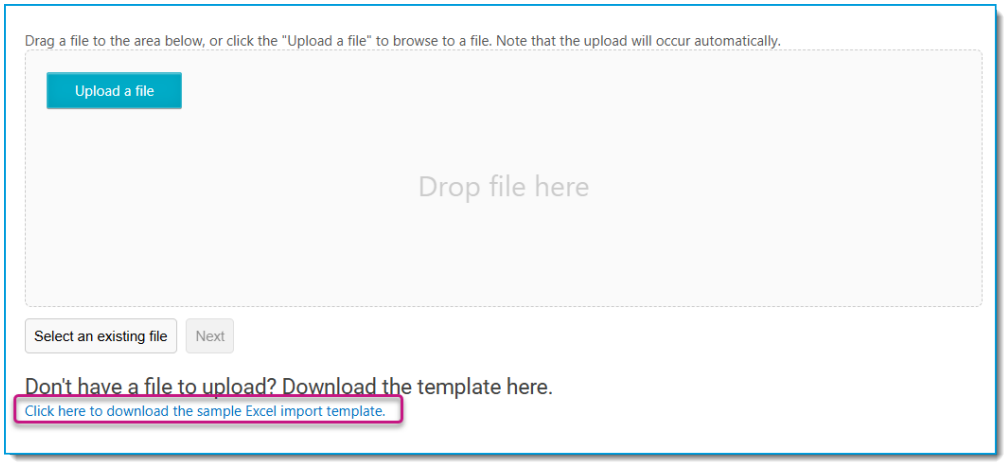
Step 3: Define forecast profile collection parameters

Click *File specification* to open the window for uploading the Excel file.

Select an Existing File or *Upload a file*.



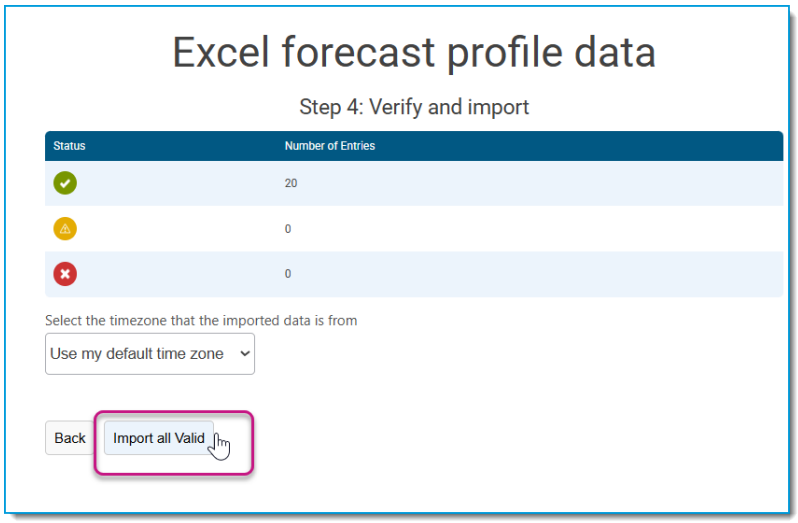
The *Upload a new file* page includes a downloadable template if needed.



1. Locate and select the Excel spreadsheet that you have saved locally and click *Open*. **Note:** The file must not be open on your computer.
2. Click *Next*.

3. Click *Create a new Import Template*.

4. Name your file for easy reference.
5. Click *OK*.
6. Click *Select* to use the newly created template.
7. Review the verification and import screen. Verify that your data has the expected valid rows for import then click *Import all Valid*.



8. Click *Finish*.
9. Click *Finish* again.

Manual data profile

Step 2: Select forecast profile type

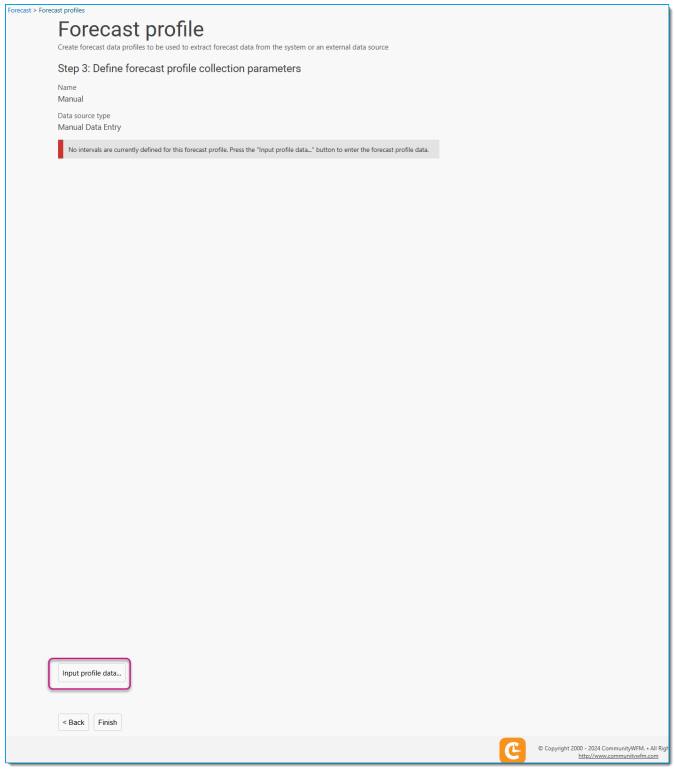
Click *Select* in the Manual Data Entry row. Once selected you cannot go back and change this setting.

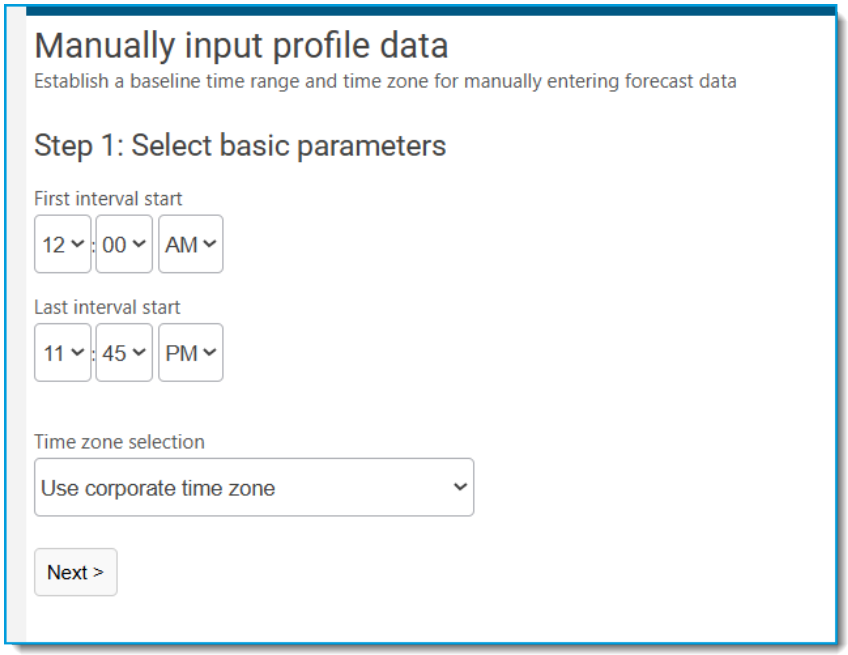
Step 3: Define forecast profile collection parameters

Scroll down and click *Input profile data.*

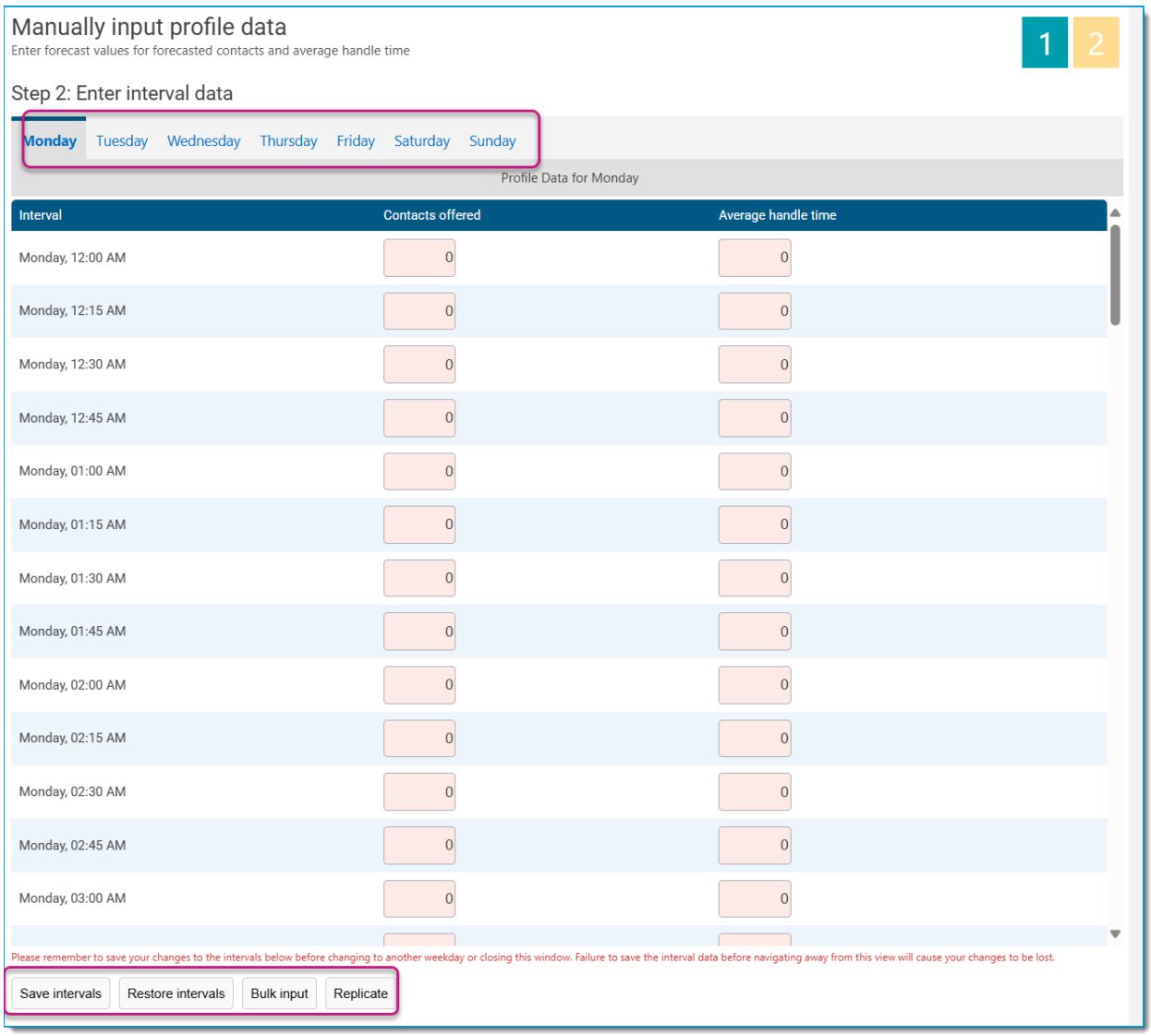
In the new window, enter the *First interval start* time and *Last interval start* time and time zone to use in this forecast profile (default, corporate, or select a zone). This defines the timeframes for which you will manually enter the data.

Click *Next.*





Enter interval data for each day and time interval. **Reminder:** Save the intervals for each day before moving on to the next day. Use the *Bulk input* or *Replicate* functions to automate some of the data entry. When finished, close the browser window then click *Finish*.



Static profile from special calendar events

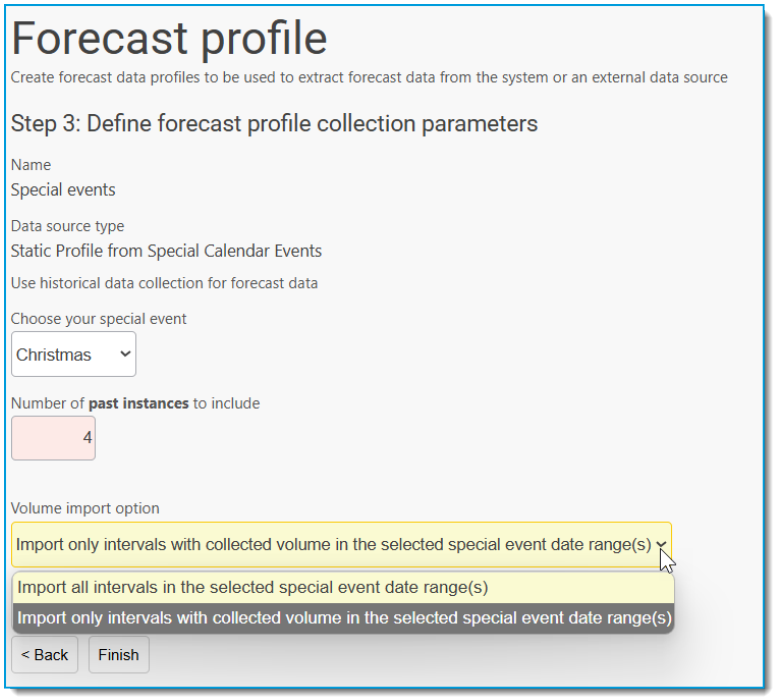
You must first create Special Calendar Events in order to use this profile type. For recurring holidays, you can also use static profile.

Step 2: Select forecast profile type

Click *Select* in the Static Profile from Special Days row. Once selected you cannot go back and change this setting.

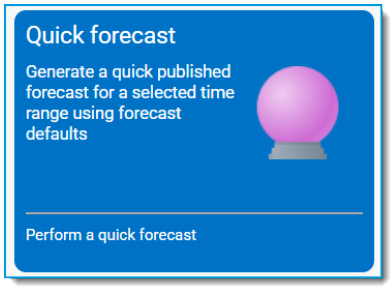
Step 3: Define forecast profile collection parameters

1. Select from the *Choose your special event* drop-down.
2. Enter the number of past instances of the Special Calendar Event to include. Default is 4.
3. **Volume import option:** Select whether to import all intervals in the special event date range selected or only those with collected volume. If selecting **all** intervals—including those without volume (days or intervals with 0)—it could skew the averaging making the forecast less accurate.
4. Click *Finish*.



Quick forecast

One forecast profile may be designated as the default for a quick forecast. To create a quick forecast, navigate to a published forecast and click *Perform a quick forecast*.



Select a date range that you are forecasting for then click *Generate*. CommunityWFM will create a working forecast using the designated quick forecast profile, and process the forecast to completion, including the publication of the forecast.