



Essentials Workbook

Preparing for Your Essentials Training



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About This Document

The purpose of this document is to help you prepare for your upcoming CommunityWFM Essentials software training. Use this checklist to help compile the information you will need for successful CommunityWFM Essentials training and to facilitate discussions about the workforce management operations within your business.

Preparing for Your Essentials Training

Please complete this fillable form with as much information as you can and provide it to your project manager as soon as possible prior to your first day of training.

During the first day of training and Essentials set up, we will create the Enterprise Model (the representation of your business in CommunityWFM) and the Organizational Model (the reporting hierarchy within your business), which form the basic structure for forecasting, scheduling, and reporting.

We'll import queues and activities (called "skills" in the Enterprise Model) from your ACD to automatically build the Enterprise Model to use for forecasting and scheduling. We will use your employee information (your reporting structure of supervisors, team leads, agents, etc.) to build the Organizational Model.

Your onboarding specialist will help you create and assign skills to your agents. We will use your agent's current schedules to create the schedule templates — the weekly shift structures assigned to agents.

Set-up information

Hours of operation, including days of the week.

- Weekdays: Open _____ Close _____
- Weekends: Open _____ Close _____ ☐ Saturday ☐ Sunday
- Variable (describe): _____
- Default time zone (typically corporate or data collection zone): _____

Forecast defaults

- Service level (if so, define: 80/20? 90/30?) _____ / _____
OR Average speed to answer (ASA)? _____
- Deferred service level for email? _____% within _____ hours ☐ business ☐ clock



Name and ID of queues and skills to import from the ACD to create activities/skills:
If more than ten queues/skills, provide as a separate list.

Name	ID

Not Ready/AUX codes currently in use and how you use them:
If more than ten codes, provide as a separate list.

Code	How Used



Employee information

We'll use this information to build the Organizational Model that includes all users of CommunityWFM Essentials. See Excel template.

For Each User

- First and last name (middle initial optional)
- Hire date (and associated tie-breaker if needed)
- Time zone (if other than default)
- Role (agent, supervisor, scheduler, or administrator)
- ACD phone login ID
- Assigned supervisor (for CommunityWFM reporting purposes)
- List of activities/skills by agent. Is the agent multi-skilled or do they only take one type of call? (Don't list a skill if the agent only assists on an activity occasionally or during emergencies.)
- Current schedules
 - What is the current schedule for each agent (we'll build this into the CommunityWFM schedule template)?
 - If a rotating schedule, where is the agent in the rotation, and how many steps/weeks are in the rotation?

Do you have copies of your agent's current schedules?

☐ Yes ☐ No ☐ Don't know

For Each Team

Agent reporting structure (e.g., Manager>Supervisor>Team Lead>Agent) with teams and assignments clearly identified (not necessarily human resources reporting structure, but the functional day-to-day reporting that will guide your tracking, monitoring, measuring, and analyzing of performance and success).



Pre-discovery discussion and preparation

The following information will be helpful as we set up Essentials.

Adherence Goals

Have you identified an adherence goal?

☐ Yes ☐ No

If so, what is it? _____

An adherence goal is how closely agents are able to adhere to their schedule (a typical goal is 85%). We can help you define your adherence goal during the training.

Roles for Users

Each user in Essentials has an assigned role. The titles for these roles may not be the same as what you currently use, but the tasks should be familiar.

- Administrator
- Scheduler
- Supervisor
- Agent

Your onboarding specialist can help you determine the correct roles within Essentials for the users in your organizational structure.

Who will be responsible for forecasting, scheduling, and real-time monitoring/real-time adherence (RTM or RTA)?

☐ Administrator ☐ Scheduler ☐ Supervisor

Who will be responsible for maintaining schedules (e.g., adding exceptions intraday)?

☐ Administrator ☐ Scheduler ☐ Supervisor

What is the frequency of your current scheduling process? One week of schedules / two weeks in advance? Publish/create a schedule on Friday for the following week?

Describe: _____

How will your supervisors use CommunityWFM?

- ☐ Running forecasts or creating schedules?
- ☐ Managing RTA exceptions, e.g., unscheduled time-off, meetings, and approving time-off requests?
- ☐ Other: _____

**How will your team lead(s) use CommunityWFM?**

- ☐ Making assignments/monitoring adherence for direct reports?
- ☐ Managing RTA exceptions e.g., unscheduled time-off, meetings, and approving time-off requests?

How will your agents use CommunityWFM?

- ☐ Just for schedules/adherence?
- ☐ Swapping shifts?
- ☐ Requesting and tracking time-off requests

Time-off requests**Will agents request time-off using CommunityWFM?**

- ☐ Yes ☐ No ☐ Don't know

Who will be responsible for approving time-off?

- ☐ Administrator ☐ Scheduler ☐ Supervisor

Will you use the CommunityWFM auto-approve service?

- ☐ Yes ☐ No ☐ Don't know

Do you have any current rules for time-off requests (e.g., black-out days, maximum number of agents per day)?

- ☐ Yes ☐ No ☐ Don't know

Describe: _____

How far in advance do people need to request time-off?

Describe: _____

Implementation**Do you have a software roll-out plan for CommunityWFM?**

- ☐ Yes ☐ No ☐ Don't know

- Realistic long and short-term goals?
- Internal implementation plan, communication plan, and change management strategy?
- Documentation of processes and procedures?
- Training for users based on role?