CommunityWFM
A RingCentral company

Intraday Analysis and Reforecasting

Webinar handout
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Contents

About this document

This document accompanies the CommunityWFM College webinar *Intraday Analysis and Reforecasting*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

What is intraday analysis?

Intraday analysis and management includes reviewing then rebalancing your daily schedule to mitigate service performance risk, while meeting the demands of your customers and agents.

Your finely crafted workforce planning masterpiece is an ever-changing work in progress, from the moment you publish it until entering the last exception.

With so many shifting variables, forecasts and schedules can quickly become outdated. Unexpected disruptions and occurrences such as unplanned absenteeism, unannounced internal activities, spikes in calls, or weather-related disruptions require immediate attention and corrective action.

Key tasks for WFM analysts

Planning ahead

Analysts, leadership, and key stakeholders should collaborate and create intraday management strategies in advance, allowing the WFM analyst to execute the plan when needed.

Creating SOPs

Documenting and sharing those plans is crucial for them to be effective when implemented. A set of approved standard operating procedures (SOPs) can guide you.

If service level drops or AHT increases, what is the priority of changes to mitigate the effects? If there are extra staff, what are the priority 'down-time' activities?

SOPs can also help prevent overreacting or knee-jerk responses that may not be helpful. Incremental instead of sweeping changes may be all that you need to get back on track.

Know what you are going to do based on common staffing conditions and include in your SOP:

- When will action will be taken?
- Who will get on/off phones first?
- Who will be notified?
- Who is responsible for communication/execution?
- How will the plan be communicated?
    - CommunityWFM has embedded communication channels (pop-ups, text, email, mobile app) facilitating very rapid realignment of resources.

Anticipating problems

No matter how well you plan the daily schedule, things happen. An agent (or two) calls out sick, someone is late coming back from break, a customer encounter takes longer than expected. Intraday management requires flexibility and finesse.

Each day

- Run a **published schedule report** for the current week. Look at tomorrow's schedule.
- Review net line statistics (at the top) to see where there might be problems with meeting service level (understaffed) or opportunities for scheduling meetings or training (overstaffed).
- Look at trends. Are Mondays typically busier than Thursdays (and if so, do you schedule more staff on Mondays)? Did someone add meetings on Monday without asking?

Run scenarios

Run *What If* forecasts and change the contact volume or shrinkage. What does that do to your plan? *What Ifs* can also help you practice and improve your forecasting.

Identifying problems

- Set up the **Anomaly detection service** to automatically send a notification when there is an unexpected change in call volume, handle time, or abandoned calls.

Throughout the day:

- Review today's schedule in the **published schedule report**, which includes actual shrinkage not just forecasted shrinkage.

- Review the **ASAM** to see if callouts or tardiness might affect today's plan.
- Follow the **intraday performance monitor** regularly throughout the day to identify changes in call volume/handle time.
- Run an **adherence report**. Are people following today's plan? **Tip:** You can sort the report by adherence percentage.

Implementing Changes

Touch base with agents/supervisors/team leads as soon as you identify that you may need to make changes. They may have suggestions (maybe that scheduled meeting isn't really mandatory).

Don't be overzealous with schedule changes. Consider walking a tightrope instead of using a wrecking ball (making multiple small adjustments to create the desired effect instead of sweeping changes where the pendulum may just swing back and forth).

Strategies for intraday management

- **Increase staff**
  - Delete off-phone events
  - Extend shifts
  - Offer overtime shifts
  - Schedule back-up phone staff
  - Reduce lunch duration
- **Decrease staff**
  - Plan a meeting
  - Assist other areas that help the center
  - Increase lunch duration
  - Offer voluntary time-off
- **Refine staff**
  - Reoptimize off-phone events
  - Shift cross-trained staff from overstaffed to understaffed areas

Reforecasting

Forecasts use data from past performance to predict the future and while they are best guesses, they are still guesses. Staffing, training and meetings, lunches and breaks, may be determined weeks in advance and things change. Not even the best meteorologist can tell you exactly where the hurricane will come ashore.

Why isn't my forecast accurate?

- How did you create the forecast? Were there appropriate estimates for contact volume and handle time (the correct type of forecast profile)?
- Did you consider other factors such as marketing initiatives?
- Are there outside influences—weather, transit strike, epidemics?
- Timing. How far in advance did you create the forecast (is the data stale)?
- When forecasting for shrinkage did you use the default in the Enterprise Model or do your events have designated shrinkage properties?
- Are you tracking and monitoring your forecast accuracy every week? Are you evaluating how often you miss service level and why?

Revising your forecast

When should you create a new forecast for the day? If the contact volume/AHT is very different or multiple people absent, you can revise your forecast at the folder or activity level.

You could also create a new forecast.

Once you have more accurate data in the published forecast you can make schedule adjustments based on the new information and project the rest of the day, e.g., an ASAP to optimize breaks and lunches or decrease staff.

Evaluating

Analyze when the crisis is over.

- Did the new plan achieve the desired result?
- Are there any lessons from today's modifications to the original plan?
- Do we need to modify our intraday plans?
- Did we communicate those plans effectively?

AI Anomaly Detection

Step by Step

When enabled, CommunityWFM will monitor incoming data hourly, daily, or weekly using data-driven statistical methodology to detect outlier contact volume, AHT, and calls abandoned. If detected, selected roles receive a notification.

Anomaly detection can help predict staffing needs, identify times of spikes or troughs in call volume (system failure; fraudulent activity), and analyze campaign performance.

Anomaly detection service

Enable the service to detect anomalies.	**1.** Go to Settings > Application settings > Administrative settings > Services **2.** Select *Yes* for *Service enabled?* **3.** Impersonated user ID. Select from the list of supervisor or higher people. **There must be a designated user ID for the service to run.**

Anomaly detection hub

Set the parameters for notification	**1.** Go to AI > Anomaly detection. **2.** Select the activity from the Enterprise Model. You will have the option to include the same settings for subordinate activities. **Basic properties** **3.** Select *Yes* to enable the anomaly detection. **4.** Select one or more frequencies: hourly (start of each hour), daily (start of corporate day), weekly (first day of week in Enterprise Model). This is how often this system will check for anomalies. **5.** Check the box to copy this setting to all subordinate activities. If selected, you will need to confirm the option as it will overwrite any previous settings for those activities.

Alert thresholds

6. **Notification frequency:** Default is *Notify me any time there is an anomaly detected.* Options include no notification or once per day.

7. **Confidence:** Refers to how sure the system is that an occurrence is unusual or abnormal. Select highest, high, medium, or low. Higher confidence may result in fewer reports.

8. **PValue History Length:** Refers to how much past data the detection system uses to decide whether a new incoming data point is anomalous. Select highest, high, medium, or low.

   - A lower PValue History Length means the model "forgets" previous large spikes or patterns faster, making it more sensitive to recent changes. This can potentially lead to more detected anomalies (including more false positives) if the data has frequent, short-lived variations.

   - A higher PValue History Length means the model considers a longer history, making it less sensitive to short-term fluctuations and more likely to alert on persistent changes, thus potentially leading to fewer anomalies detected overall but with higher confidence.

Notification configuration

9. First, configure *Channels to notify on* in Settings > Application settings > Administrative settings > Notifications.

10. Select what role should receive notifications and via which channel(s). Note: To receive notifications, the person must be in the reporting tree for the activity.

The alert banner at the top reports whether there are current anomalies detected and if detected, a list of the anomalies.

Reports

Weekly Report

Each day: review tomorrow's schedule.

Published schedule report

Anticipating potential issues.

1. Go to Report > Published schedule > Schedule details > Enterprise Model.
2. In the *Select a report date* drop-down, select tomorrow's date.
3. Review the net line statistics for intervals where staffing will not meet service level, or where over-staffing provides an opportunity for meetings/training.
4. Hover over a number to review a pop-up of the stats for each Activity before making changes to the published schedule.

Intraday Reports

Keep these reports open and monitor throughout the day.

If a queue goes from green to amber, it shouldn't take hours before someone notices. It may quickly go to red and be beyond recovery.

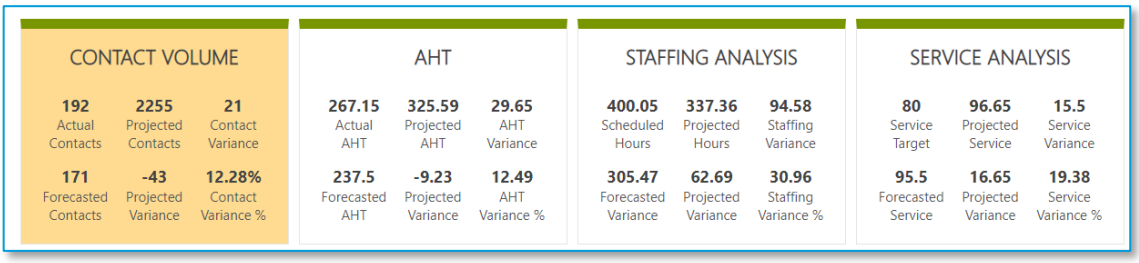
Automated Schedule Attendance Monitor (ASAM)

View who has (or has not) checked in.	**1.** Go to Today (home page). **2.** If you don't see the ASAM, add it via *Personalize*.
	• Data refreshes every 30 seconds (default) or you can change from no refresh up to every 120 seconds. • View check-in status by summary, or view agent cards for the interval. • Click and drag an agent card to mark people as absent for the day.

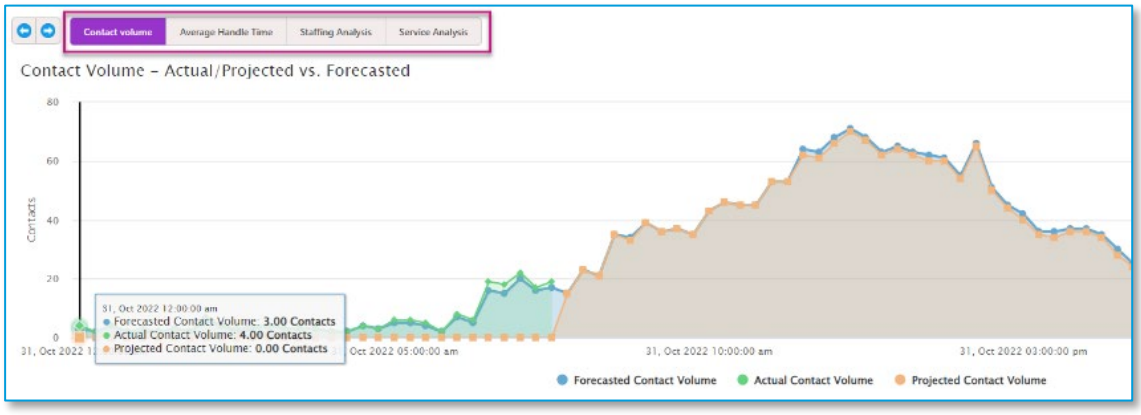
Intraday performance monitor

View how status compares to today's forecast. Keep open and monitor regularly.	Go to Report > Intraday analysis > Intraday performance monitor.
	• Monitors same day data and reprojects the rest of the day. • Filter for contact volume, average handle time, staffing analysis, or service analysis. • This report shows 15-minute intervals. **Note:** the report refreshes every 15 minutes based on the time you opened or last refreshed the report, not the interval time. You can change the refresh rate in the report options, but it's best to keep it at the interval that matches your center's schedules.

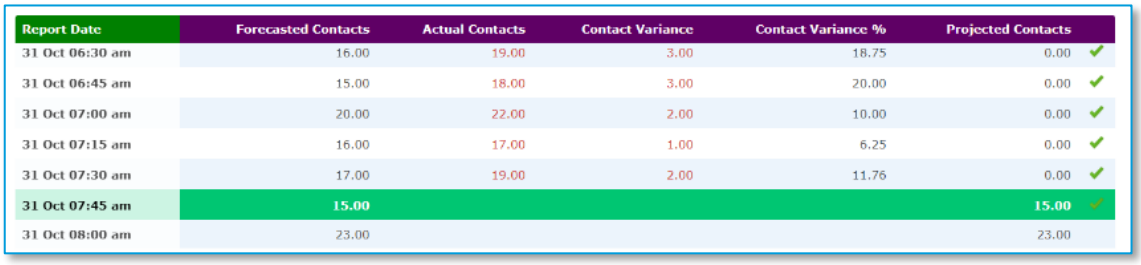
Tiles at the top shows forecasted, actual, projected, and variance for contact volume, AHT, staffing analysis, and service level.



The graph shows the trends, with tabs to change the data type.



The table shows the intervals, with a green line at the current interval.

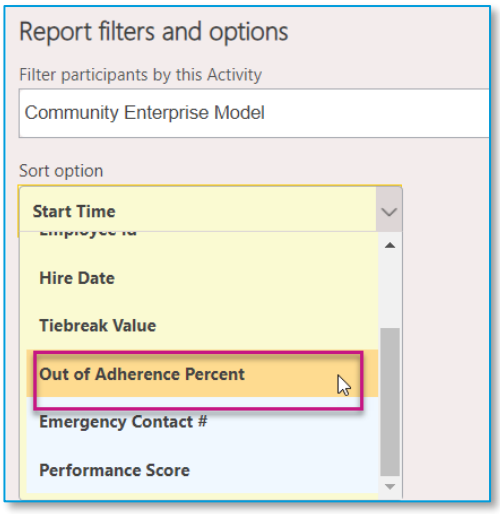


Report Date	Forecasted Contacts	Actual Contacts	Contact Variance	Contact Variance %	Projected Contacts	
31 Oct 06:30 am	16.00	19.00	3.00	18.75	0.00	✔
31 Oct 06:45 am	15.00	18.00	3.00	20.00	0.00	✔
31 Oct 07:00 am	20.00	22.00	2.00	10.00	0.00	✔
31 Oct 07:15 am	16.00	17.00	1.00	6.25	0.00	✔
31 Oct 07:30 am	17.00	19.00	2.00	11.76	0.00	✔
31 Oct 07:45 am	15.00				15.00	✔
31 Oct 08:00 am	23.00				23.00	

Don't rely on the overall center report statistics! Drill down to the activity/folder level using the report options panel before adjusting your schedule.

<table>
<tr><th colspan="2">Schedule adherence report</th></tr>
<tr><td rowspan="2">View how well people are adhering to today's plan.</td><td>Go to Report > Schedule adherence > Daily schedule adherence > Enterprise model (or preferred view).</td></tr>
<tr><td>

You can filter the report by adherence percentage to see who is having trouble.



The default view is today.
This report does not automatically refresh. Refresh the page periodically to view current adherence data.

</td></tr>
<tr><td></td><td>Monitor how well people are adhering to their schedules.


</td></tr>
</table>

Revise a Working Forecast

Step by Step

1. Go to forecasts > Working forecast.
2. Open the forecast for today.
3. In the navigation pane under Working Forecast Contact Volume select *Revise forecast data*.

Step 1: Basic properties

4. Select the activity. If only one area is in trouble, no need to reforecast for the whole center.
5. Add a comment (required).
6. Select the date range (can select a single day or the whole week).
7. Select how to make the revision: by interval, daily total, weekly total, or monthly total.

Step 2: Revise intervals

8. Select adjustment method from the drop-down menu for CV and/or AHT for the timeframe.
9. Enter the adjustment amount(s).
10. Click *Save* and confirm the adjustments.
11. Click *Finish*.

Complete the forecast steps

12. Click *Generate clusters*.
13. Click *Finish*.
14. Click *Generate forecast* and complete the steps to generate the forecast for the activity and date range.
15. Publish the forecast for the activity and data range.
16. This won't change the current published schedule, but it will change the projected variances for that group.

If you specified using the published forecast when the schedule was created, it will look to this new data for forecasted requirements in reports and when optimizing scheduled events.

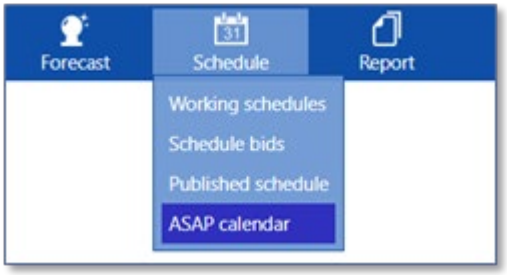
ASAP to reoptimize off-phone events

Optimize Off-phone Events will analyze current staffing levels and try to place events in a more optimal time slot than their current placement.

Use Optimize Off-phone Events ASAP to adjust the placement of scheduled events to account for intraday staffing variations. Optimize Off-phone Events is often used to adjust breaks and lunches but can work for a variety of other event types.

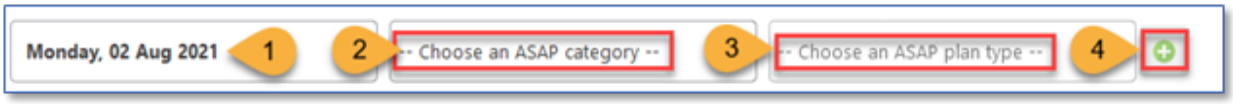
Navigate to ASAP Optimize Off-phone Events from one of three places:

- Schedule > ASAP calendar



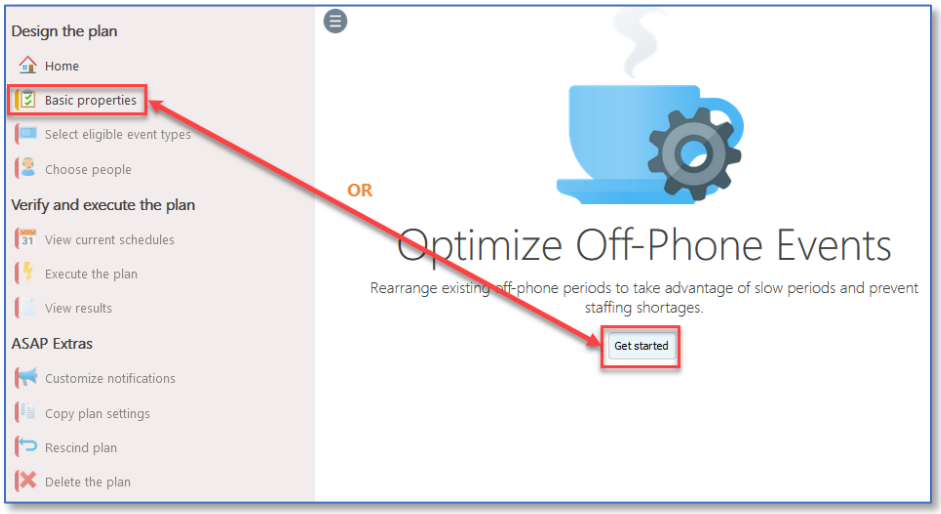
- Published Schedule Report
- Daily Adherence Report

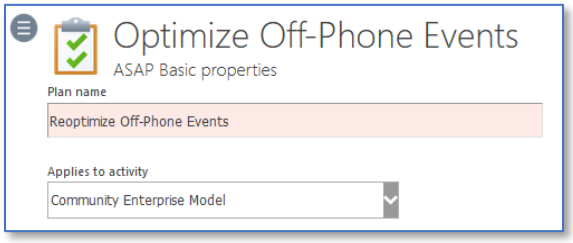
At the top of the page select a date, then from the drop-down menu select the ASAP category, then the ASAP plan type, finally click the green plus (+) to launch the ASAP planning window.



Basic properties

1. Click *Get Started* in the middle of the page or *Basic properties* (note that all other buttons are red and greyed out, indicating that they cannot be configured until step 1 is complete).



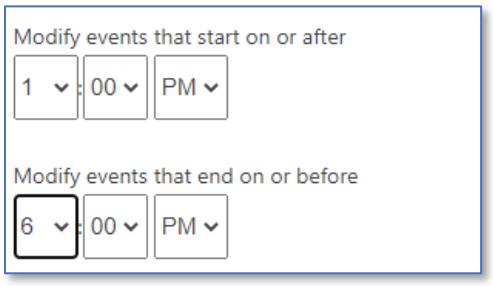


2. **Plan name:** Enter a plan name.

3. **Applies to Activity:** Use to include schedules that have a specific activity assigned. For example, only include agents who have a specific activity assigned in their profile.

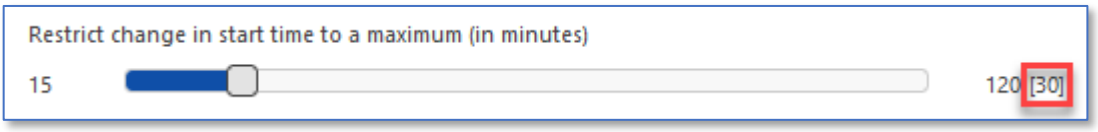
4. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).

5. Identify the window of time for the plan to look at to optimize breaks and/or lunches. Edit both *Modify events that start on or after* and *Modify events that end on or before*. For example: if we put 1 pm and 6 pm, the plan will optimize any events that start at or after 1 pm and before or at 6 pm.

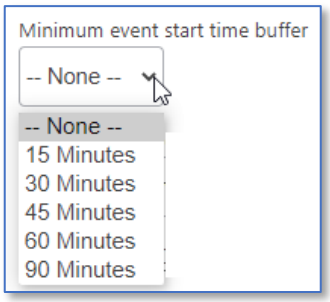


6. The slider *Restrict change in start time to a maximum (in minutes)* tells the system how far it can move the break left or right. The minimum is 15 minutes. If you have an event at 1:30 pm and you set the slider to 15 mins, that optimized break could begin at 1:15 pm or 1:45 pm. If you set the slider to two hours, that optimized 1:30 pm break could be moved to 11:30 am or 3:30 pm. Consider

keeping the range to 15–30 minutes. The number in parentheses to the right of the slider indicates the selected number of minutes.

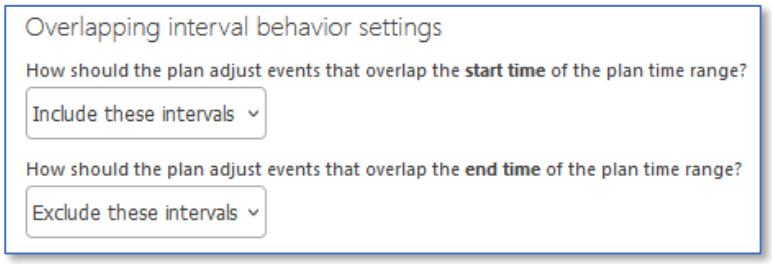


7. **Minimum event start time buffer** will prevent the break from being placed right next to another event. If you leave as *None*, it could put the break right up against a published event such as a meeting or coaching. If you set it to 15 minutes, it will place it at least 15 minutes before or after any other event on the schedule.



6. **Restrict to people compatible with the selected agent template** allows customization of the plan. If the plan will apply to everyone leave this as -- No Selection--.

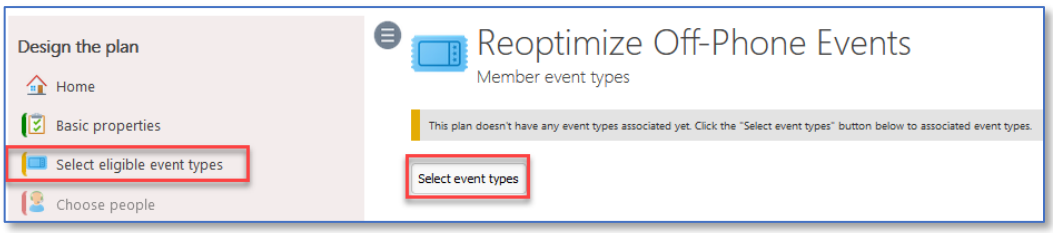
7. **Overlapping interval behavior settings** allows you to include or exclude events that start and/or end outside the selected time window. For example: Our event starts at 1:00 PM. A lunch starts at 12:45 pm and ends at 1:15 pm. If we *include* the overlapping activity, the plan will optimize the lunch. If we *exclude* overlapping activity, the plan will exclude lunch optimization because it does not start at or after 1 pm. You can overlap for start time and end time of the plan independently.



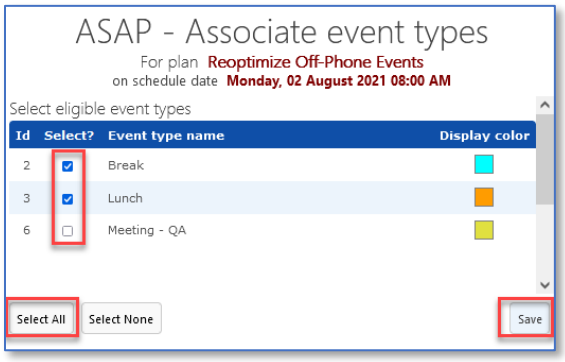
8. Click *Save plan properties* to complete the configuration of the basic properties.

Select Eligible event types

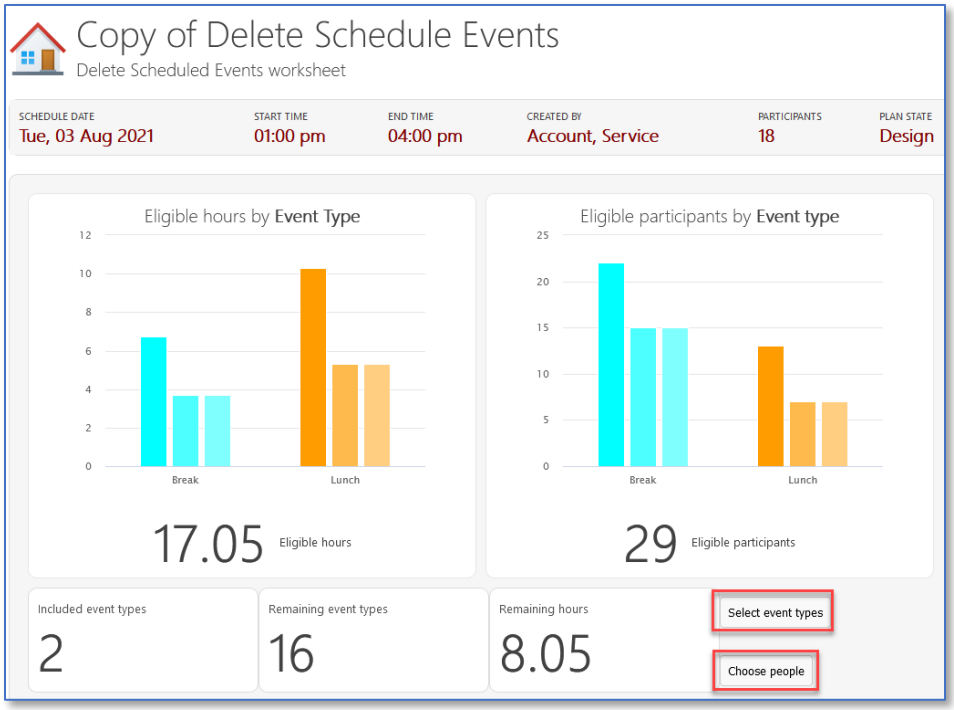
9. Click *Select eligible event types* or *Select event types* to tell the plan what types of events to optimize.



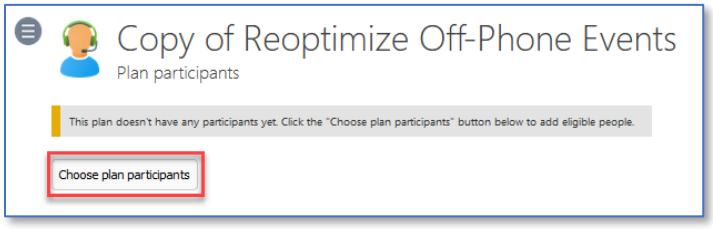
10. In the pop-up, *Select All* or select individual events then click *Save*.



The chart will show you the total number of hours available for optimization. You can add additional event types or move on to selecting people.

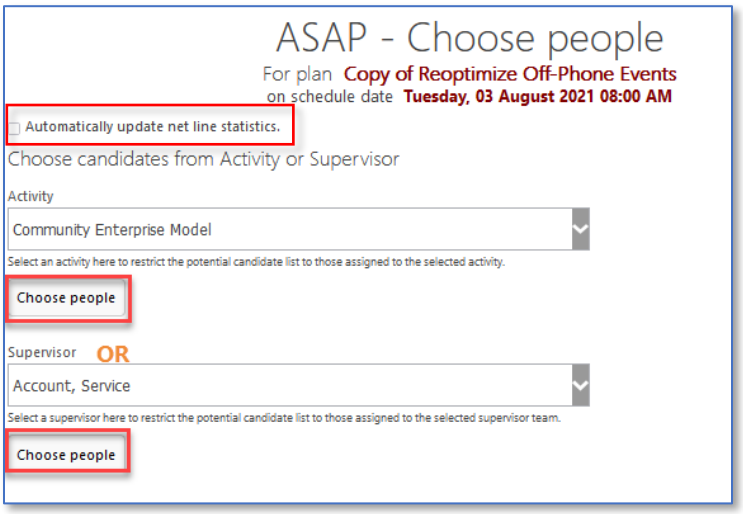


11. Click *Choose people* on the events worksheet or on the left side menu then click *Choose plan participants*. In this example, the selection window will only display agents who have a break or lunch that falls between 1 pm and 4 pm.

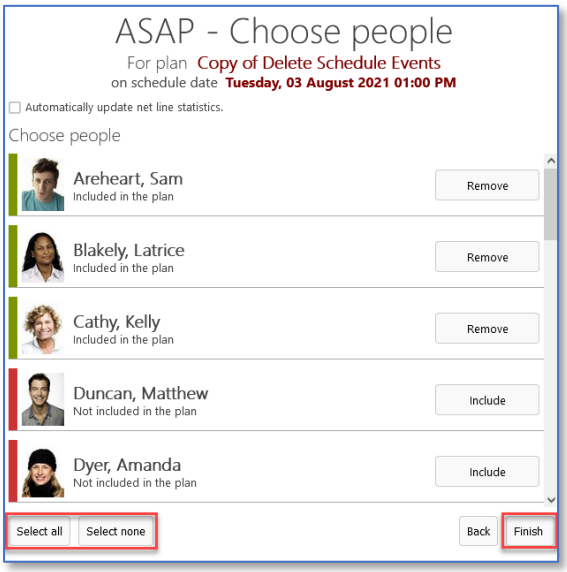


12. Select one of the *Choose* buttons to select the candidates from Activity or Supervisor. Decide whether you want to filter for everyone in the enterprise model (or just an activity), **or** you can select a specific supervisor's team.

    Indicate whether to automatically update net line statistics. If you want to update your variance and expected service metrics at the top of your schedules, check the box to automatically update net line statistics.



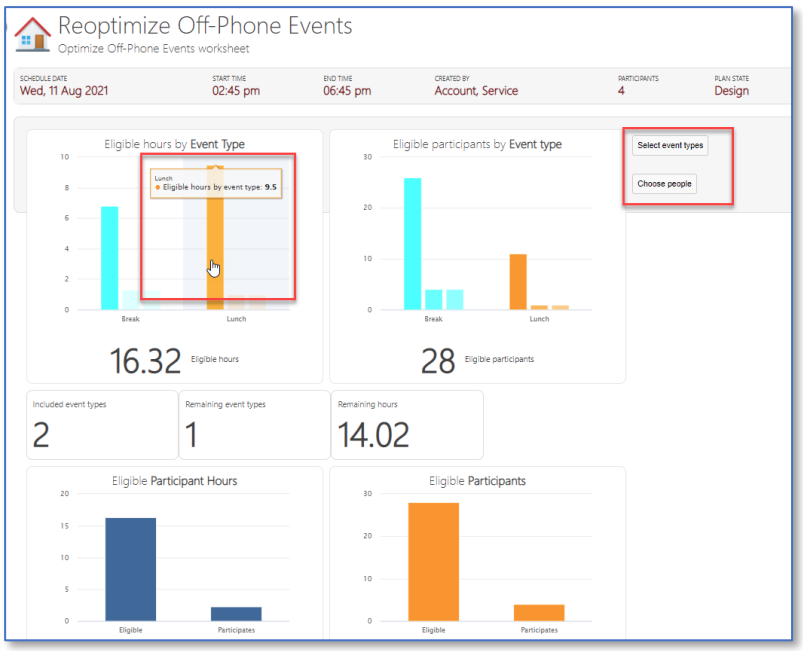
13. Once you determine the filter, you can choose to optimize all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if there is someone with a medical condition that requires them to have breaks at a specific time, you would exclude them from the plan.



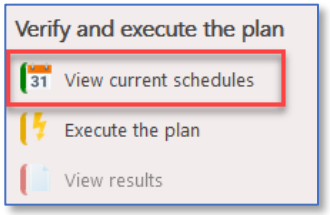
14. Make your selections then click *Finish*.

New graphs display eligible hours, eligible participants, and remaining eligible people. To increase the optimization, add additional people by clicking *Choose people* or adding additional events by clicking *Select event types*.

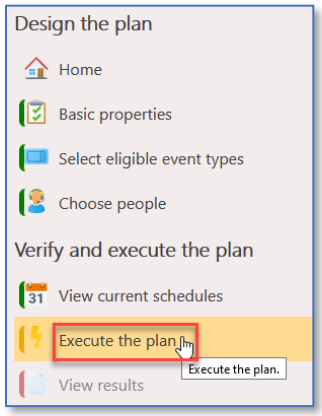
To view the graph legends, hover over the bars.



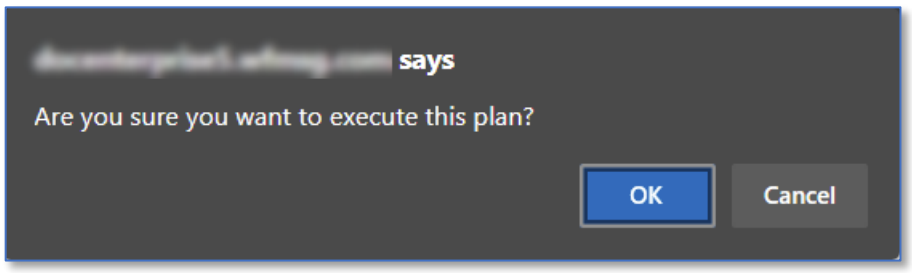
15. Prior to executing you can *View current schedules* to preview the effect of the ASAP.



16. Click *Execute the plan*. When you execute the plan, it will analyze your coverage numbers and optimize the agents' schedules for your selected events (e.g., breaks and/or lunches).



17. Confirm that you want to execute the ASAP.



Note: Once executed, you *cannot* undo the action. For example, if you optimize breaks and lunches, you cannot revert the breaks and lunches to their original time by deleting the ASAP.