



CommunityWFM
A RingCentral company

What if I...? How to use what-if scenarios for planning

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About this document

This document accompanies the CommunityWFM College webinar *What if I...? How to create what-if scenarios for planning*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Why create what if scenarios?

What If scenarios are a method of testing different options within CommunityWFM / AI WFM to help determine which is the best fit for your center and your schedules, or to help determine what additional resources you will need. There are many ways to use *What Ifs*; you just need to define the question you want to answer.

Examples of when you might create a *What If* include:

- You're hiring five new agents. Which place in your schedule has the greatest need to place these additional people based on your forecast?
- What effect will changing the service level have on cost?
- The business is considering a new product line. How many additional agents will you need to handle the expected increase in call volume?
- What effect will cross-training for a specific skill have on efficiency?

What Ifs can help answer these questions.

How to create a what if scenario

The process for creating a *What If* follows most of the same steps as forecasting and scheduling. You create “working” versions of forecasts and schedules and change variables along the way to find the answers to your questions.

*There is not an easy button! There are still
many steps to complete the process.*

There are two ways to create a *What if* scenario:

1. Do a ‘one-off’ scenario for a specific week or
2. Create a *what if* scenario with components that you can re-use multiple times.



Scenario I – Finding the Best Place to Fit New Employees

Assumption

- You've created a working forecast for the date range.

Overview

1. Create a schedule template.
2. Create a placeholder agent template.
3. Create a new working forecast.
4. Create a new working schedule (that will include the placeholder agent).
5. Generate an optimized schedule.

You know that you're going to hire five new employees and you want the system to tell you where the greatest need is based on your forecast, then to create schedules for them.

To do this, we'll create a common day floating schedule template that includes all the possible combinations of days a new agent can work. We'll give it a range of hours, and let the system pick the start and end times. It's called Common **Day** floating because the shift start time/schedule CommunityWFM creates for the day with the greatest need will be the same shift for the rest of the shifts that week for that person, but each person could have a different start time.

Step-by-step

1. Determine the number of new FTEs (full-time equivalents) you plan to add – in this example we'll assume five.
2. Determine the number of hours in the shift and the breaksets. For example: FTE works 8.5-hour shift with (2) paid 15-minute breaks and a 30-minute unpaid lunch 5 days per week.
3. Determine the activity assignment for the new employees.
4. Create the schedule template for the new FTEs.

Settings > Schedule Templates > Schedule templates

- a. Select *Click here to set up a new schedule template*.
- b. Select *Common Day Floating*.
- c. **Name:** call it what the schedule is going to be – 8.5 hr. day x 5 days.
- d. **Description** is not required but could be helpful.



- e. **Number of scheduled days:** enter the number of days: 5.
- f. **Duration (hours):** the total number of hours for the shift (work + unpaid lunch): 8.5.
- g. **Break set:** Select the break set for the shift duration.
- h. **Use common day behavior for off-phone periods?** Do you want the breaks and lunches to be at the same time every day? If you have the same start and end time for the shift, do you want the breaks and lunches to be at the same times, too? If you're optimizing breaks and lunches for everyone else, you may want to do the same with the new schedules. If you want breaks and lunch to be at the same time each day, select *Yes*. If you want them to be optimized by the system, select *No*.
- i. **Work type:** Select the default work type.
- j. Click *Save*.
- k. Click *Next*.
- l. Select the **earliest and the latest start time** for the shift. If your center is open 9:00 am – 7:00 pm, for an 8.5 hour shift the earliest would be 9:00 am and the latest would be 10:30 am (ending at 7:00 pm).
- m. Click *Save* (□). The sample display will show the correct earliest and latest start and the earliest and latest end times in the range.
- n. Click *Next*.
- o. Select the patterns of work or the days for the schedules. In this example, our center is only open Mon–Fri so we'll have just one pattern: Monday–Friday. Enter a name for the pattern and check the boxes for the workdays.
If your center is open 7 days/week, but agents only work 5 of those days, you'll want to create multiple day off patterns to include all the options. See the appendix for a list of all available [day off patterns](#) for a center that is open 7 days per week.
- p. Click *Save* (□).
- q. Add any additional day patterns, *Save* each pattern, then click *Finish*.
When the system creates the five new 8.5-hour shifts, it will look at the selected hours and the days of week and determine the greatest need based on your forecast, then fit the schedules to the expected demand.

Additional What If options: You can adjust the selections to add weekends or other shifts, etc.

5. Create a clone person or a placeholder agent — an agent template. This is the 'agent' that we will use in the *What If* scenarios.

Settings > People & agent templates > Agent templates

- a. Select *Click here to create a new agent template*.
- b. Give it a name – e.g., New Hire for billing.
- c. Select the site and employee classification (if applicable).



- d. Select the *Employee classifications assignment rule* – whether to consider classifications when creating schedules.
- e. Set the default work type.
- f. *Minimum activity overlap for schedule related item assignments*: Leave this set at the default.
- g. Click *Save*.

Step 2 Activity assignments

- h. Click *Activities* in the navigation pane or tile and check the boxes to add the types of calls this agent will take. An activity is required to have a schedule assigned. Typically, you'll assign the activities with the greatest need, or the activities where you assign new hires.
- i. Click *Save*.

Step 3 Scheduling parameters

- j. Click *Scheduling* in the navigation pane or tile and assign a schedule template. Select the Schedule template type, then a template from the Schedule template dropdown menu. It doesn't matter which one, just assign one because once we get into the *What If* scenario, we're going to select which ones to use. You can leave the other settings as defaults.
- k. Click *Save*.

We now have a placeholder agent in the system and can create our *What If* scenario.

- 6. Create a new working forecast (if not already created. If you have a working forecast for the date range, skip ahead to Step 7)..

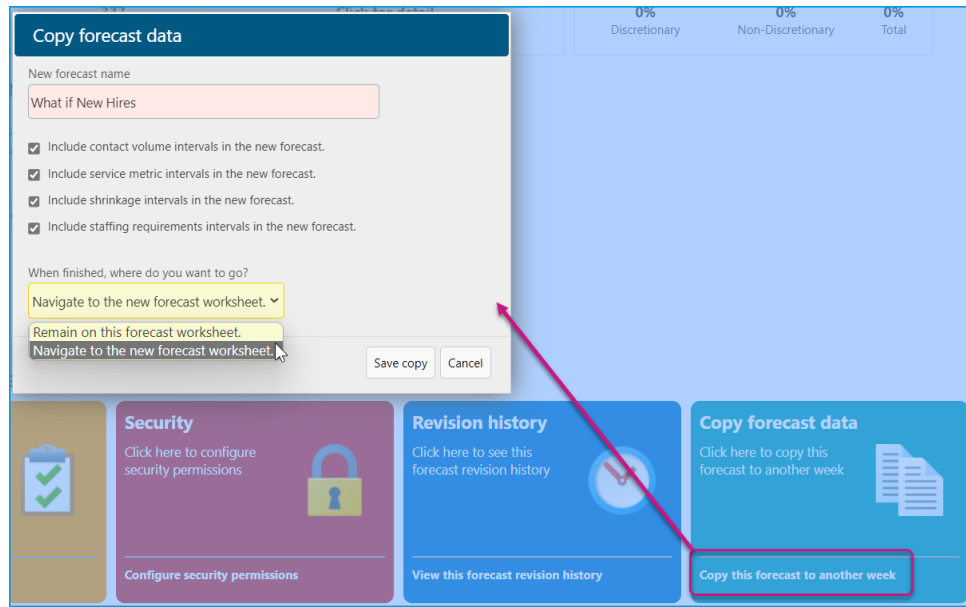
Forecast > Working forecasts

- a. Select *Click here to create a new forecast* or copy an existing forecast.

To copy a forecast:

- i. Open the forecast you wish to copy.
- ii. Click *Copy the forecast to another week* in the Copy forecast data tile.
- iii. In the pop-up, enter a name such as *What If New Hires*.

Note: Be sure to change the drop-down menu to open the new forecast in a new worksheet.



- iv. Click *Save copy*.
- v. Check the Forecast worksheet name and make sure you're in the new worksheet.
- b. Go through the steps to create the working forecast and generate forecast data for the **contact volume**.

In the Working Forecast Contact Volume section, click *Generate forecast data*.

Step 1 Basic properties: Select the activity and date range for the new hires. Click *Next*.

Step 2 Select forecast profile: Most common is the 4-week rolling but use the most appropriate profile for your scenario. Click *Select* then click *Next*.

Step 3 Configure profile details is not required for this profile. Click *Next*.

Step 4 Import forecast data Click *Import data* to generate the call volume. Click *Next*. When complete, click *Next*.

Step 5 Select forecast method: Typically, *Classic Community Forecast*. Click *Next*.

Step 6 Forecast method details is not required for this method. If choosing weekly weighted average forecast method, you would apply weights to the weeks here.

Step 7 Generate forecast: Click *Generate forecast*. When complete click *Finish*.

- c. Go through the steps to create the working forecast and generate forecast data for the **Staffing Requirements**.

In the **Working Forecast Staffing Requirements** section of the navigation pane:

- i. In the pop-up, click **Generate clusters** for the activity assignments. Click *Finish* when complete.
- ii. Click **Generate the forecast data** for the staffing requirements.



Step 1 Basic properties: Select the activity and date range for the new hires. Click *Next*.

Step 2 Service metric sources: Default is from the Enterprise Model. click *Next*.

Step 3 Shrinkage percentage sources: Default is from the Enterprise Model. Click *Next*.

Step 4 Generate forecast data: Click *Generate Forecast*.

Step 5 Finish: When complete, click *Finish*.

No need to publish the working forecast – and you don't want to overwrite your published forecast. When creating the *What If* schedule you can point it to the *working* forecast.

7. Create a new working schedule.

Schedule > Working schedules

- a. Select *Click here to create new working schedules*.

Step 1 Basic properties

- i. Select the activity/site where you plan to place your new hires.
- ii. Give the working schedule a name such as *What if*.
- iii. Add a description (optional).

Note: Because we don't have a published forecast for this week **uncheck** *Automatically include a reference to this week's published forecast*.

- iv. Click *Next*.

Step 2 Select one or more schedule weeks

- v. Select the week we're creating the *What If* for then click *Next*.

Step 3 Review new schedules (open working schedule worksheet)

- vi. Click on either date to open the schedule worksheet.
- b. Click *Set up custom participants* in the *Select schedule participants* tile or *Select schedule participants* in the navigation menu for the working schedule steps to success.
- c. Select the *Agent Template* tab (so you'll be able to see when you've added the agent template)

This is where we'll select the participants for the working schedule, including the placeholder agent for the new hires.

- d. Click *Add agent templates*.

Note: for this step, the drop-down menus appear only after selecting an option in the prior drop-down menu.



Add agent templates to working schedule participant list

Schedule template type: Common Day Floating
Schedule template: 8.5 hr day x 5 days
Additional assignment parameters: -- Default --
Droppable: Do not drop

Choose "No" from this list to use the default assignment.

Agent template name	Current schedule	Schedule type	Assignment notes	Status	Quantity	
New Hire - Billing	8.5 hr day x 5 days	Common Day Floating	Floating Schedule Day Assignment:	☒	5	Add

1. In the pop-up window, select the **schedule template type** from the drop-down (in this example Common Day Floating)
2. In the **Schedule template** drop down, select the name of the template you created for the placeholder agents.
3. **Additional assignment parameters** allows selecting only a specific day off pattern. Leaving it set to default, the system will select the pattern with the best fit based on the forecast.
4. **Droppable:** leave as *Do not drop* because you want all your new hires to have a schedule.
5. In the table, enter the **quantity** of new hires in the template you created for the *What Ifs*.
6. Click *Add*.
- e. Click *Add People* to add the other employees.
- f. Click *Add everyone* then click *OK* to confirm your choice to add all the employees to this scenario or select individual employees. Close the pop-up window.
8. Select Forecast Data
 - a. In the navigation pane, click *Select forecast data*.
 - b. Click *New*.
 - c. In the Forecast selection dropdown, select *Select a working forecast*.
 - d. Choose your working forecast from the list then click *Next*.
 - e. Choose the week with the forecast data then click *Next*.
 - f. Click *Finish*.
9. Generate Optimized Schedules
 - a. In the navigation pane, click *Generate optimized schedules*.
 - b. Click *Generate schedule*.

c. In the drop-down **How do you define the people included in this schedule**, change to *Use this working schedule participant list* and the system will create the schedules for the regular staff, and then it will go out and look for where to put the five new agents. It creates schedules for your regular staff first, so it knows where the gaps are for the new *What If* agents. It will take a little longer to run than a normal schedule.



- d. The ***How would you like to set your schedule bias*** slider allows you to adjust whether to have more coverage/better service level or less coverage/less cost. Because we made our schedule not droppable, it will not affect the results for this schedule.
- g. Click *Go*.
- e. When it's finished, close the pop-up window.

We just created a working schedule with all our regular staff and an additional five common day floating schedules, and the system determined the best fits for the new schedules.

10. View the working schedule.

- a. Select *Manage agent schedules* in the navigation pane.
- b. Select the Folder or Activity then click *Apply options*.
- c. The result shows the selected staff with placeholders for the new agents.
Note: If you don't see the placeholder agents: change the report sort option to *Name* and they will be at the bottom.
- d. To view the full week schedule for one agent: click on the name and select *Show the weekly schedule details*. The placeholder agents do not have agent cards.

This result shows the schedules with the greatest need, information that you (or HR) can use when hiring the new agents.



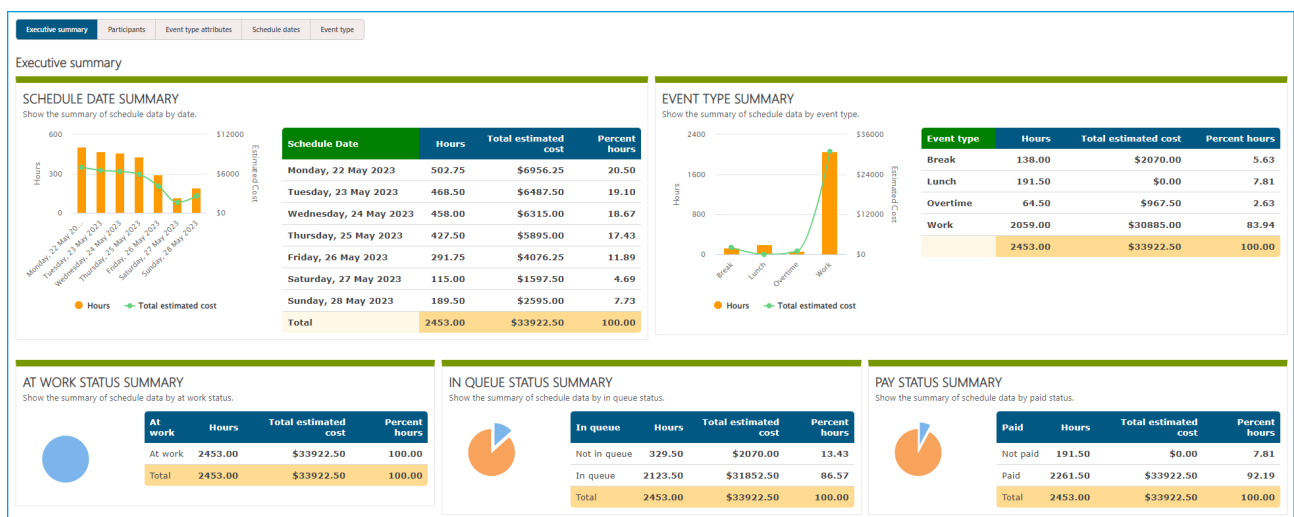
Reports

In the Working Schedule worksheet—

To see all agents and templates schedules for the week, run the **Layered Schedule Summary** report found under *Printer-friendly Schedule Reports*.

Another way to view the *What-If* agent schedules is the **Unassigned participant report**. In the *Interactive Schedule Reports* section of the navigation pane, expand the section then select the report. This display shows all unassigned agents and their schedules for the selected week.

To view an executive summary that includes the cost increase / decrease for this change: in the *Schedule Analysis & Summary Reports* section, run the **Schedule event summary** report. If your Enterprise Model includes the average wage, this report will show the costs.





Scenario II – Changing service level

Assumptions

- You have completed these steps and saved a copy of the existing forecast staffing report with your current service level to compare with the new forecast staffing.
- If comparing costs, you have defined the average wage for the site in the Enterprise Model (Settings > Enterprise model > Activity > Site properties Step 1: Basic properties | Average wage). Alternatively, you can share the What If results with HR / leadership who should know the fully-loaded average cost of a contact center agent to determine the cost savings/increase.

Site 1 - Dallas, TX
Step 1: Basic properties

Name
Site 1 - Dallas, TX

Description

Number of available seats
450

Average wage
15

Time zone
(GMT-06:00) Central Time (US & Canada)

First day of schedule week
Monday

Overview

- Save a copy of the forecast staffing report with current service level.
- Create a new forecast profile.
- Create a working forecast for service targets and edit the service metric source.
- Compare the forecast staffing reports.

There is a balance between service level and cost. Add more agents and you may improve service level but at an increased cost to the business. Using a *What If* scenario, you can adjust the service level and review the effect on the cost.

Step-by-step

Create a new forecast profile

Forecast > Forecast profiles

Select [Click here to create a new forecast profile](#).

- Step 1: Basic properties**



- a. **Name:** Give it a representative name (e.g., *What If Service Target 60/40* to assess decreasing the service level from 80/20).
 - b. **Description** is not required but could be helpful.
 - c. **Use this profile for quick forecasting?** Select *No*.
 - d. **This profile will contain what type of data?** Select *Service targets*.
 - e. Click *Next*.
2. **Step 2: Select data source type** Manual Data Entry is the only option. Click *Select*.
 3. **Step 3: Define forecast profile collection parameters.**

- a. Click *Input profile data*.

Step 1: Select Basic Parameters.

- b. Select *First* and *Last interval start times* for your center. This should cover all the hours your center is open.
- c. Click *Next*.
- d. **Service metric type:** Select *Service level* (most common for call volume and AHT; *Deferred SL* would be for things like email and chat) from the drop-down menu.
- e. Enter the revised *Service level percent* and *Service level time (seconds)*.
- f. Click *Next*.

Step 2: Enter interval data.

- g. Enter a forecast service level for each interval for each day. To enter the same service level for a whole day (or partial day), click *Bulk input*.
- h. Click *Save intervals* for each day before moving to the next day.
- i. If another day has the same forecast service level, click *Replicate* then check the days that are the same.
- j. When complete, close the window then refresh the Forecast profile window, and review the forecasted service level. If correct, click *Finish*.

The forecast profile is now available in the list to use when generating a forecast.



Create a working forecast for service targets

Forecast > Working Forecasts

1. Select *Click here to create a new forecast* or copy an existing working forecast.
2. **Working Forecast Properties—Forecast name:** Give it a representative name (e.g., *What If Service Target*)
3. Click *Save*.
4. Go through the steps to generate the Call Volume and AHT forecast data for your selected activity and week.
5. In the working forecast steps-to-success navigation pane, expand the section for **Working Forecast Service Targets**
6. Click *Generate forecast data*.

Step 1 Basic properties

- a. Select your activity and date.
- b. Click *Next*.

Step 2 Select forecast profile

- c. Select your What If Service Target forecast profile.
- d. Click *Next*.

Step 3 Configure profile details Click *Next*.

Step 4 Import forecast data

- e. Click *Import data* and when finished click *Next*.

Step 5 Select forecast method: Click *Next*.

Step 6 Forecast method details: Click *Next*.

Step 7 Generate forecast

- f. Click *Generate forecast* then click *Finish*.
7. Click *View forecast reports* in the Working Forecast Service Targets section.
 8. Select the activity and date range then click *Apply options*. Confirm the revised service level for each activity.



Go through the steps to create the working forecast and generate forecast data for the **Staffing Requirements**.

9. In the **Working Forecast Staffing Requirements** section of the navigation pane, click *Generate clusters*.
 - a. In the pop-up, click **Generate clusters** for the activity assignments. Click *Finish* when complete.
10. In the navigation pane click *Generate forecast*.

Step 1 Basic properties

- a. Select the Activity and date range.
- b. Click *Next*.

Step 2 Service metric sources

- c. Click *Edit all*.
 - d. Select *Working forecast service objective forecast*.
- e. Click *Save*.
 - f. Click *Next*.

Step 3 Shrinkage percentage sources

- g. Click *Next* unless you have a shrinkage forecast and need to change shrinkage.

Step 4 Generate intermediate forecast

- h. Click *Generate forecast*.

Step 5 Finish

- i. When complete, click *Finish*.
11. In the Working Forecast Staffing Requirements section of the navigation pane, click *View Forecast Reports*.
 - a. Select the Activity and date range.
 - b. Click *Apply options*.
 12. Select the **Staffing FTEs** tab on the report.

To view the change in agents needed with the adjusted service level, compare the new *Total Adjusted FTEs* column to the number that appeared before changing the service level.

HR or leadership should be able to determine the cost savings or increase, based on the average cost of a contact center agent.

See also [Reports](#).



Day off patterns

This list includes all pattern options for a center open 7 days per week, with agents working 5 days per week. The *Day pattern name* = days off.

The number of days for each day pattern must be 5

Day pattern name	Selected work days	
SA-SU	☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday	 
MO-SU	☐ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☐ Sunday	 
TU-SU	☒ Monday ☐ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☐ Sunday	 
WE-SU	☒ Monday ☒ Tuesday ☐ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☐ Sunday	 
TH-SU	☒ Monday ☒ Tuesday ☒ Wednesday ☐ Thursday ☒ Friday ☒ Saturday ☐ Sunday	 
FR-SU	☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☐ Friday ☒ Saturday ☐ Sunday	 
MO-SA	☐ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☒ Sunday	 
TU-SA	☒ Monday ☐ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☒ Sunday	 
WE-SA	☒ Monday ☒ Tuesday ☐ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☒ Sunday	 
TH-SA	☒ Monday ☒ Tuesday ☒ Wednesday ☐ Thursday ☒ Friday ☐ Saturday ☒ Sunday	 
FR-SA	☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☐ Friday ☐ Saturday ☒ Sunday	 
MO-FR	☐ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☐ Friday ☒ Saturday ☒ Sunday	 
TU-FR	☒ Monday ☐ Tuesday ☒ Wednesday ☒ Thursday ☐ Friday ☒ Saturday ☒ Sunday	 
WE-FR	☒ Monday ☒ Tuesday ☐ Wednesday ☒ Thursday ☐ Friday ☒ Saturday ☒ Sunday	 
TH-FR	☒ Monday ☒ Tuesday ☒ Wednesday ☐ Thursday ☐ Friday ☒ Saturday ☒ Sunday	 
MO-TH	☐ Monday ☒ Tuesday ☒ Wednesday ☐ Thursday ☒ Friday ☒ Saturday ☒ Sunday	 
TU-TH	☒ Monday ☐ Tuesday ☒ Wednesday ☐ Thursday ☒ Friday ☒ Saturday ☒ Sunday	 
WE-TH	☒ Monday ☒ Tuesday ☐ Wednesday ☐ Thursday ☒ Friday ☒ Saturday ☒ Sunday	 
MO-WE	☐ Monday ☒ Tuesday ☐ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒ Sunday	 
TU-WE	☒ Monday ☐ Tuesday ☐ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒ Sunday	 
MO-TU	☐ Monday ☐ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒ Sunday	 
	☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday	

Successfully retrieved common-day schedule day patterns. (3/4/2020 2:03:19 PM)