



Feature Description

Schedule Bidding

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Schedule Bidding

CommunityWFM Enterprise™ offers users a fully automated end-to-end approach for schedule bidding. Create optimized schedules independent of agents, choose which agents will participate in the bid, allow agents to rank their choices, and then automatically reconcile agent rankings against the available inventory of schedules. CommunityWFM Enterprise then builds the completed schedules and seamlessly assigns them to agents with no manual administration required.

CommunityWFM's unique agent bidding interface color codes schedules for agents, based upon the probability of each agent holding a particular schedule given their rank amongst their peers. This approach allows agents unparalleled visibility into what schedules they are likely to receive when the ranking is assigned.

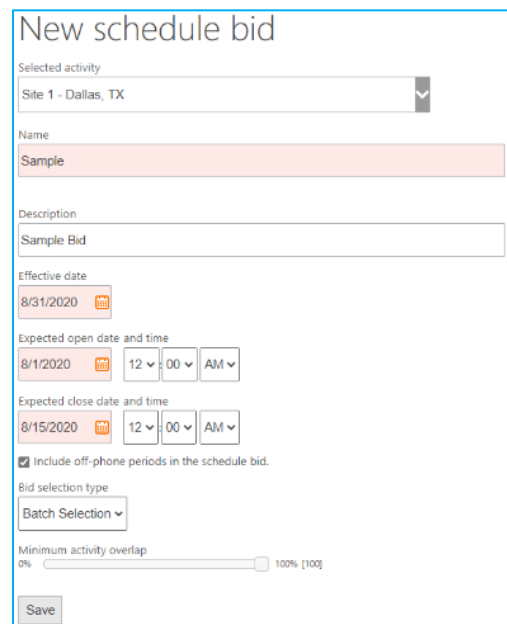
The balance of this document will provide an overview of each step in the bid process and its capabilities.

Administration

As a bid administrator, you are in complete control of the bidding process. When creating a new bid, the bid administrator may choose to add additional administrators for that unique bid instance.

Establishing a Bid

Administrators determine which parts of their organization will participate in the bid by selecting from the Enterprise Model. Basic parameters are then set for the effective date and the opening and closing dates of the bid selection process. Bid opening and closing may be scheduled for specific dates and times, enabling unattended open and close of bidding selection. Additionally, bid administrators may determine skill compatibility along with choosing whether to include breaks and lunches as a part of the bid.



The screenshot shows the 'New schedule bid' form with the following fields and values:

- Selected activity:** Site 1 - Dallas, TX
- Name:** Sample
- Description:** Sample Bid
- Effective date:** 8/31/2020
- Expected open date and time:** 8/1/2020 12:00 AM
- Expected close date and time:** 8/15/2020 12:00 AM
- Include off-phone periods in the schedule bid:** ☒
- Bid selection type:** Batch Selection
- Minimum activity overlap:** 0% to 100% [100]
- Save** button

Participants

After completing the initial setup, choose the bid participants. Users may select for inclusion individuals, a selection, or all agents from the previously established Enterprise Model.

Skill compatibility and classification determine the inventory that users will be presented within the agent bidding interface. There is no need to create a separate bid for each department or skill group independently. This significantly reduces the administrative effort as all agents within a site may be part of the same bid process.

Schedule bid - people
Sample

Id	Add?	Agent Name	Role	Schedule Inventory?
278	☐	Areheart, Sam	Agent	☐
156	☐	Azzarito, Deborah	Agent	☐
453	☐	Badgett, Gregory	Agent	☐
451	☐	Barton, Jean	Agent	☐
479	☐	Bickley, Sharon	Agent	☐
27	☐	Blakely, Latrice	Agent	☐
467	☐	Brown, Chanell	Agent	☐
402	☐	Burns, Barbara	Agent	☐
391	☐	Carabo, Randy	Agent	☐

Save Select all Unselect all

Agent Ranking

Among the chief considerations for a schedule bid is the ranking order of participants. Who gets to pick first? CommunityWFM allows you to create unlimited ranking profiles that determine the order in which agent selections are matched to the schedule inventory.

Ranking profiles can utilize internal fields, such as seniority date, or user created fields such as a performance score. Multiple criteria may be selected as a tie breaker.

Ranking profile properties
Create reusable sorting criteria for your people.

Step 1: Basic properties

Name
demo

Description
Sample

Start time preference option
Use the average start time preference for all days of the week

Start time penalty factor
10 (Significant penalty)

Save Preview

Step 2: Configure sorting criteria

Ordinal	Sort column	Comments
1	Performance Score	☐ ☐ ☐
2	Hire Date	☐ ☐ ☐

Add sort option

Schedule Inventory

Import inventory items for **Sample**
Step 1: Import properties

Working schedule
Schedule for Q3 bid

Selected schedule details
☐ Only import schedules from Schedule Bid Participants.

Selected schedule options
Automatically import all qualifying schedules as inventory items

Only include participants with the selected employee classification
-- No Selection --

Time zone selection
Use my default time zone

Schedule inventory refers to the set of schedules that agents will be ranking. Schedule inventory can be imported from an optimized set of schedules created specifically for this bid, or existing schedules that are still considered effective may be reused and offered to the same agents based upon updated ranking criteria.

Breaks and lunches will be reflected on inventory items when included with the bid.

CommunityWFM provides administrators full control over schedule inventory, review inventory, and agent eligibility to selected inventory items.

Schedule inventory can be modified, replaced, and manually created as necessary.

The schedule bid inventory worksheet keeps track of how many participants and how much inventory you have configured to ensure that you have the proper number of schedules for agents to rank.

Schedule bid inventory worksheet
Sample

Inventory statistics
60 days remaining until the bid is closed.

Schedules in bid inventory:	0	Status: Insufficient inventory count Action: Create or import additional inventory items.
Current participant count:	62	
Variance (Inventory - Participants):	-62	

How do you want to add schedules to your bid inventory?

Import from a working schedule
Pick a working schedule and import them into this bid.

Create them by hand
Build schedules directly into the bid by hand.

Want to report on the inventory or start over? Choose from these options.

Current inventory report
Show the schedule inventory details, or choose one of these reports.
[View Reports](#) | [Inventory](#)

Delete all inventory items
Delete all items in the inventory and start over.

Once schedule inventory is established, your bid is ready to be offered to agents.

Agent Interface

Manual schedule bidding can be a tedious task for everyone involved. CommunityWFM makes bidding for agents easy, keeping them informed during each step of the process. Agents only need to rank schedules for which they meet both skill and classification requirements. Part-time agents only bid on part-time schedules. There is no need to run separate bids for full or part-time agents. Video-based help walks agents through the process of editing and submitting their bid selections.

Color Coded Probabilities

CommunityWFM presents agents with only the schedules for which they are eligible in a simple color-coded easy to understand interface.

Four colors (green, yellow, orange and red) inform agents of the likelihood of being able to hold a particular inventory item based on the selection of agents who may be ranked higher than they are.

Red and orange inventory items indicate higher ranked agents are focused on these schedules, where yellow and green indicate a good chance of getting those schedules. As higher ranked agents continue to adjust their bid selections, color coding is updated to reflect the most current conditions.

Inventory preview for Q2

Bid rank: 31 of 62

Important dates: Bid open date: Wednesday, January 15 2020 12:00 AM; Bid close date: Saturday, February 15 2020 12:00 AM; Bid effective date: Wednesday, April 01 2020 12:00 AM

Utilities: [Menu Icon] [Auto sort Icon]

Commit this bid | Rescind commitment

Item	Weekday	Earliest Start	Latest End	Preference Score	Activity Score	Current Bid Score
187	Monday	01:45 PM	10:15 PM	0.00	100.00	23.41
188	Monday	05:00 AM	01:00 PM	0.00	100.00	26.51
236	Monday	10:00 PM	06:30 AM	0.00	100.00	11.91
297	Monday	10:00 PM	06:30 AM	0.00	100.00	8.30
333	Monday	01:00 PM	10:00 PM	0.00	100.00	12.79
391	Monday	08:00 AM	04:00 PM	0.00	100.00	11.51
390	Monday	05:45 AM	02:15 PM	0.00	100.00	11.71
389	Monday	01:45 PM	10:15 PM	0.00	100.00	13.11
388	Monday	01:00 PM	10:00 PM	0.00	100.00	21.5
392	Monday	05:00 AM	01:00 PM	0.00	100.00	15.40
385	Monday	09:45 PM	06:15 AM	0.00	100.00	22.25
396	Monday	04:00 PM	12:30 AM	0.00	100.00	3.59

Bid 9 Item 47, Days: Mon; Tue; Wed; Thu; Fri; Shift Duration: 8.5 Hours

Day	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	24:00
Monday																			
Tuesday																			
Wednesday																			
Thursday																			
Friday																			
Saturday																			
Sunday																			

Item Scoring: Preference Score: 0.00; Activity Score: 100.00; Bid Score: 11.51

Item Settings: Current Name: 1; Option: None; Bookmark: No

Item Options: Like, Dislike, Move up, Move down, Bookmark

Inventory items can be individually reviewed in detail, liked, disliked, ranked, and evaluated.

Preference Based Pre-ranking

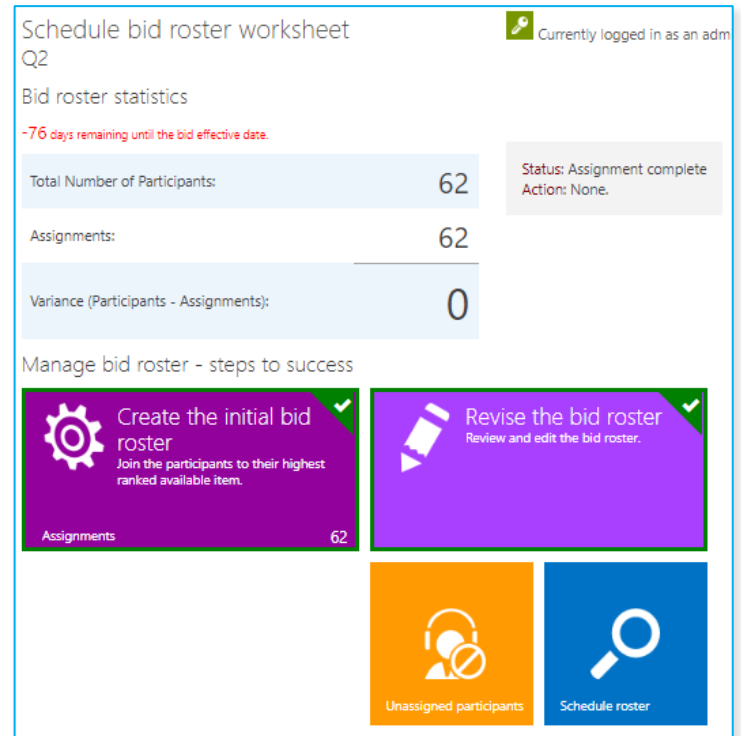
Agents can pre-establish their schedule ranking by using personal schedule preferences. Schedule inventory will be automatically pre-ranked based upon preferences when entered.

Bid Completion

Auto Assignment of Selections

Once all ranking selections are committed by agents, the bid may be closed for selection. Administrators may optionally commit all uncommitted selections if some agents have not yet committed their rankings.

CommunityWFM then allows you to automatically pair agents with their selections based upon the previously established rank order. In seconds, CommunityWFM completes what can take hours manually.



Schedule bid roster worksheet Q2

Currently logged in as an adm

Bid roster statistics

-76 days remaining until the bid effective date.

Total Number of Participants:	62	Status: Assignment complete Action: None.
Assignments:	62	
Variance (Participants - Assignments):	0	

Manage bid roster - steps to success



Create the initial bid roster
Join the participants to their highest ranked available item.

Assignments 62



Revise the bid roster
Review and edit the bid roster.



Unassigned participants

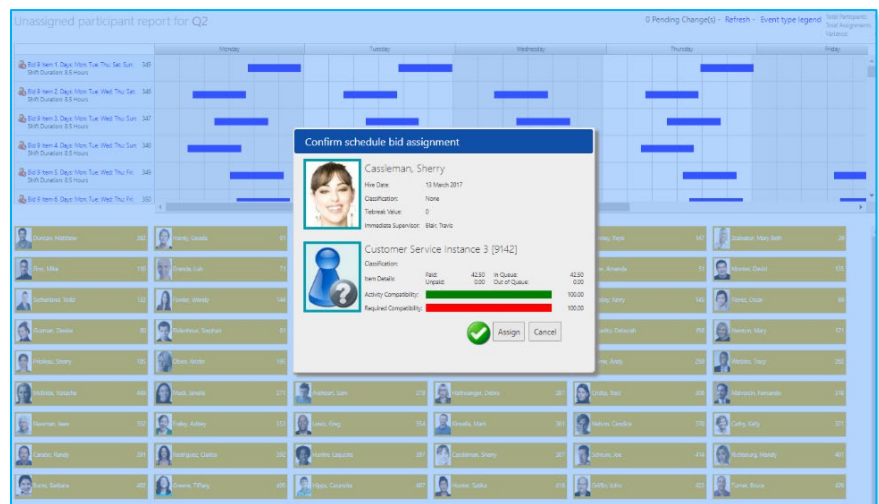


Schedule roster

Drag and Drop Assignment

CommunityWFM supports the option to bypass the automatic assignment process and simply allow agents to select their preferred schedule in an individual drag and drop kiosk process.

The agent may review remaining schedules, select, and a simple drag and drop procedure associates the agent with the select schedule, validating skill assignment at the time of selection.



Unassigned participant report for Q2

Confirm schedule bid assignment

Casselman, Sherry

Hire Date: 13 March 2017

Classification: Customer Service Instance 3 [9142]

Activity Completion: 100%

Assign Cancel

Auto Creation of Schedule Templates

Following the assignment process, whether automated or using the drag and drop interface, CommunityWFM will automatically build and assign schedule templates to agents based upon the bid's effective date. Flexible naming conventions allow you to tailor the creation process. CommunityWFM will even neatly file them into a separate sub-folder named for your bid.

Static breaks and lunches will be created if they were included as a part of the bid. If not, the system will automatically associate the appropriate break and lunch templates to the resulting schedule template for each agent. Imagine creating hundreds of schedule templates in seconds with the touch of a button.

Create and assign schedule templates for Q2

Default name format

Schedule Bid #ScheduleBidId# [#InventoryItemAssignedName#]

Default description format

Schedule Bid #ScheduleBidId# Assigned Agent #InventoryItemAssignedName# Effective On #ScheduleBidEffectiveDate#

☒ Automatically generate breaksets for manually created inventory items.

☒ Use folder organization for automatically generated schedule templates.

Folder name and format

Schedule Bid Templates for #ScheduleBidName# [#ScheduleBidId#]

Default review status

Approved

Please provide the following defaults for the schedule template assignment process.

Schedule Bid Property Macros		Inventory Item Property Macros	
Schedule bid id	#ScheduleBidId#	Inventory item id	#InventoryItemId#
Schedule bid name	#ScheduleBidName#	Inventory item name	#InventoryItemName#
Schedule bid effective date	#ScheduleBidEffectiveDate#	Inventory item assigned agent name	#InventoryItemAssignedName#

Note that schedule bid macros can be used with inventory item macros for template name and template description name formats. However, only schedule bid macros are available for the folder name format. To make using the macros easier, you can use your mouse to highlight the entire macro (including # signs), and drag it to the appropriate text box.

Preview

Post Bid Management

Your bid may be complete, but that doesn't mean your contact center will never change. That's why CommunityWFM's approach to bidding is still working for you after your bid is complete.

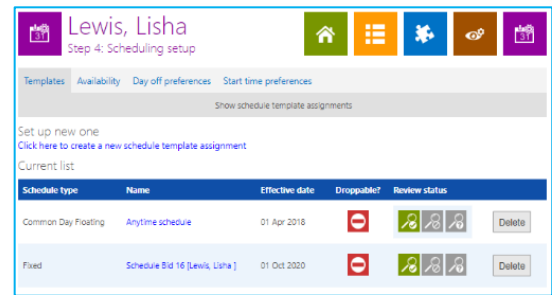
Agent schedule templates may be modified, schedule effective dates may be changed, and CommunityWFM will even go back and remove all the schedule templates that it created when you are done with them.

Schedule Template Management

CommunityWFM's unique approach to schedule bidding leverages the same features and configuration options that you would use without a schedule bid selection process.

Schedule templates may be fully edited, fixed breaks and lunches, when included in the bid as fixed items, may be fully edited. Flexible break and lunch options may be modified as needed.

There is no need to "redo" your bid just because a few agents need to permanently change their schedules.



Schedule templates

Configure the valid shift templates that you assign to your people.

[Show a simple list without folders](#)

[Show templates without folders](#)

Set up a new one

[Click here to create a new schedule template](#)

Manage existing schedule templates

The following list contains your existing schedule templates. Click the "Advanced filter options" link below to show additional filter options.

[Advanced list filter options](#)

Internal id	Template type	Template name	Description		
147	Fixed	Schedule Bid 16 [Areheart, Sam]	Schedule Bid 16 Assigned Agent Areheart, Sam Effective On 20201001	Delete	Copy
144	Fixed	Schedule Bid 16 [Azzarito, Deborah]	Schedule Bid 16 Assigned Agent Azzarito, Deborah Effective On 20201001	Delete	Copy
106	Fixed	Schedule Bid 16 [Badgett, Gregory]	Schedule Bid 16 Assigned Agent Badgett, Gregory Effective On 20201001	Delete	Copy
133	Fixed	Schedule Bid 16 [Barton, Jean]	Schedule Bid 16 Assigned Agent Barton, Jean Effective On 20201001	Delete	Copy
134	Fixed	Schedule Bid 16 [Bickley, Sharon]	Schedule Bid 16 Assigned Agent Bickley, Sharon Effective On 20201001	Delete	Copy
135	Fixed	Schedule Bid 16 [Blakely, Latrice]	Schedule Bid 16 Assigned Agent Blakely, Latrice Effective On 20201001	Delete	Copy

Compelling Bidding Solution

CommunityWFM Enterprise provides a compelling solution for schedule bidding. Reduced administration along with its unique agent ranking interface put CommunityWFM in its own class. If your contact center bids for schedules, you owe it to your WFM analysts and agents to find out more!