



CONTACT CENTER WORKFORCE MANAGEMENT SPECIAL INTEREST GROUP CHARTER

Intended Participants

- **Companies:** UW-EBC member companies with significant contact center operations and for which workforce management activities (forecasting contact volumes, capacity/staffing level planning, developing and managing variable employee schedules to achieve targeted service levels, etc.) are of sufficient importance and complexity to require specialized staff (often dedicated) to optimally execute.
- **Roles:** Those with operational responsibility for workload volume forecasting, capacity planning, and creating and managing staff schedules to achieve contact center objectives.

Goals of the SIG

Workforce Management (WFM), a sub-domain of the larger Workforce Optimization group of contact center performance management activities, is one of the most important planning and management functions in a contact center. Effectively forecasting work volumes, calculating staffing requirements, creating and adjusting staff schedules, and tracking a range of related performance metrics are essential to achieving cost and service level objectives. This SIG is a forum for those responsible for WFM activities to discuss common issues and challenges they encounter in their work – and to compare strategies and practices for addressing them. The goals of this SIG are to:

1. To provide a forum for participants to discuss topics of interest related to contact center forecasting, planning and scheduling
2. To enable participants to glean ideas for improving/enhancing their organizations' workforce management outcomes by learning about the effective strategies, practices, and processes utilized by other members of the group

Example Topics for Practice-Sharing Discussion (additional topics to be decided upon by the group)

- Establishing priorities to guide workforce management, including goals for service level, quality, and cost – and alignment of WFM-relevant metrics across different levels (center, team, and agent)
- Sizing the overall workforce/capacity planning, including strategies and practices related to seasonal workforce fluctuations
- Forecasting contact center workload
- Scheduling the workforce to achieve desired operational goals
- Diagnosing (in real-time) and addressing the root causes of WFM-related operational performance issues
- Managing challenges associated with variable scheduling, including practices around intra-day adjustments
- Managing workforce shrinkage
- Historical Reporting and Performance Management

Meeting Length, Frequency, and Location

- Meetings will be from 9:00am-4:00pm
- Four meetings have been scheduled in 2018 (approximately every 3 months), but the group may decide to schedule additional sessions if other topics of interest to a majority of the members are proposed
- Meetings will take place on the UW-Madison campus

Participant Expectations

- Each company participating in the SIG will designate a “Primary Participant” for the group.
- The Primary Participant should attend as many of the meetings as reasonably possible (dates will be provided after the first meeting).

Steering Committee

1. Jake Angus, Workforce Manager – Great Wolf Resorts
2. Jeff Cadwell, Workforce Management Leader – CUNA Mutual Group
3. Erin Filsinger, Workforce Optimization Manager – WPS Health Solutions
4. Joy Rechlitz, Director of Workforce Planning & Alignment – Northwestern Mutual Insurance