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Workforce Management Administrator's Guide

Monitoring Performance and Adherence

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- Administrator

Monitor and analyze the workforce performance and adherence data in your environment to create reports and spot trends that might have developed over time.

Related documentation:

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Performance

The Performance modules compare the forecast and schedule to what is actually happening in the contact center. WFM shows intra-day statistics, such as interaction volume, average handling time (AHT), agents logged in, service level, average speed of answer (ASA), and abandons, and compares them to the planned values.

Intra-day contact-center performance data is displayed in an informative and easy-to-read format, enabling efficient performance monitoring and quick response to unanticipated interaction flow or agent-staffing situations.

WFM also provides a “what-if” calculator as an aid to decision making. You can enter new values for staffing, interaction volume, and/or other performance statistics into the What - If window. The what-if calculator then supplies the results to be expected if the values change as you project.

See also, Contact center performance reporting metrics.

Adherence

Workforce Management provides real-time agent-adherence data, which compares the current agent status to the scheduled status. WFM can track agent adherence per time interval on a single channel or across multiple channels simultaneously.

Agents who are not adhering to their schedules (within user-defined thresholds) are highlighted in yellow if they are nonadherent or in red if they are severely nonadherent. WFM also displays the amount of time, in minutes, that the agent’s current status has differed from the scheduled status. This running total is continually updated.

Multi-channel adherence

To enable tracking of multi-channel adherence in WFM Web, assign a media channel to a Schedule State Group; WFM then calculates adherence by comparing real-time states to the scheduled states

for that channel. See the following example:

Use case 1: Multi-channel adherence

A site in the contact center has voice and e-mail related activities, and agents can make outbound calls, which are scheduled as exceptions. The schedule state groups can be configured as follows:

Schedule state group	Channel	Schedule state	Real-time state
Inbound calls	Voice/unspecified	All (immediate) voice-related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Outbound calls	Voice/unspecified	Exception types that represent outbound call work	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
E-mail	channel_name> (for example, email)	Deferred, e-mail related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Overhead	None (no channel)	Breaks, meals, time off, exceptions, etc.	NotReadyForTheNextCall, LoggedOut

If WFM is tracking multi-channel adherence (new in WFM 8.5), and there are no Schedule State Groups with a channel name under the Site, WFM calculates adherence as it would for a single agent real-time state, and Stat Server aggregates the statistics as it did prior to 8.5. However, if there is at least one Schedule State Group with a configured channel name, WFM tracks multiple channels. For each Site, WFM tracks as many different channels as there are distinct channel names for all Schedule State Groups under the Site.

For information about how to configure multi-channel adherence, see *Configuring media channels for Schedule State Groups* in the *Workforce Management Web for Supervisors (Classic) Help*.

Important

After updating to 8.5, if any site in your environment supports multiple media channels and you have configured Schedule State Groups to a setting other than None, the Agent Adherence Report includes data that differs from the data in WFM 8.1.3 in two ways:

1. For any given set of criteria (site/timezone/agent/date), the data in the 8.5 report is different than the data in the 8.1.3 report, because the adherence rules change when you add multi-channel settings to Schedule State Groups, which means the adherence percentages also changes.
2. The Schedule State, Agent State, Start Time, End Time columns are in reverse order. In 8.5, the report displays the columns in this order: Start Time, End Time, Schedule State, Agent State.

How WFM calculates adherence

Workforce Management calculates adherence for single- or multi-channel environments. For sites, in which there are schedule state groups configured for a single channel, WFM compares the agent's real-time state to the current schedule state. For sites, in which there are schedule state groups configured for multiple channels, WFM compares the agent's real-time state and reason code on each channel, with the scheduled states for that same channel during each specified time interval. If at least one scheduled state for that channel can be mapped to the channel real-time state, according to its adherence rules, the agent is considered adherent.

Single-channel adherence calculation

Single channel agent adherence is calculated as follows:

1. WFM maps the agent's real-time state plus the reason code. If there is more than one reason code, there is more than one state + reason code mapping. If there is no reason code, WFM uses only the state for mapping. For example, if the agent has real-time state **WaitingForNextCall** with reason codes **r1** and **r2**, for adherence purposes, WFM maps **WaitingForNextCall + r1** and **WaitingForNextCall + r2**.
2. WFM then finds all schedule state groups that are adherent to at least one agent real-time state from step 1. A list of schedule state groups is compiled that maps to the state, based on the configuration of the schedule state groups.
3. WFM obtains all scheduled states from the current agent schedule and maps them to the schedule state groups.
4. WFM collects all schedule state groups from step 3.
5. WFM Intersects the sets of schedule state groups from steps 2 and 4. If the intersection is not empty, the agent is adherent.

Multi-channel adherence calculation

Multi-channel agent adherence is calculated as follows:

1. Similar to step 1 in Single-channel adherence calculation, WFM maps the agent real-time state + reason code. However, in addition to the aggregated agent state, WFM also adds separate real-time states for each channel configured on the site. (Agents can sometimes have no state on certain channels.) If reason codes are used, WFM could map multiple state + reason code pairs for each channel, plus the aggregated state.
2. Similar to step 2 in Single-channel adherence calculation, WFM maps schedule state groups adherent to the aggregated state. However, in addition, WFM finds a separate set of schedule state groups for each channel. WFM considers only the schedule state groups that are specifically assigned to a particular channel for adherence with the states on that channel. WFM considers the schedule state groups without a channel for adherence with the aggregated agent state.
3. WFM obtains all scheduled states from the current agent schedule and maps them to the schedule state groups.
4. WFM collects all schedule state groups from step 3.
5. WFM Intersects the sets of schedule state groups from steps 2 and 4 separately for each channel. If both sets are empty or the intersection is not empty, WFM considers the agent is adherent to the channel. For the aggregated agent status, WFM assumes adherence, when either the pair in step 4 is

empty or step 2 and step 4 intersect. WFM considers the agent adherent, if he/she is adherent on all channels and adherent to the aggregated status.

The multi-channel algorithm also comes to a boolean conclusion; that is, the agent is either adherent or non-adherent. However, to be adherent the agent must be adherent on every channel, on which he/she is scheduled or, for which he/she receives a real-time state. Also, if the agent is scheduled on non-channel-related states, he/she must also be adherent to those states. See the following example:

Use Case 2: Multi-Channel Adherence

This use case is based on the schedule state group configuration in Use case: 1 Multi-channel adherence.

Summary	Real-time state	Scheduled states	Adherence
Agent is working on voice only, but scheduled for e-mail and voice	Agent state: CallInbound DN e-mail: NotReady DN 2323: CallInbound	E-mail activity, voice activity	Not adherent
Agent is working on e-mail and voice, but scheduled for e-mail only.	Agent state: CallInbound DN e-mail: WaitForNextCall DN 2323: CallInbound	E-mail activity	Not adherent
Agent is on a break.	Agent state: NotReady DN e-mail: NotReady DN 2323: NotReady	Break	Adherent

Calculation of agent headcount

WFM calculates the agent headcount for activities in this way: If the activity belongs to a channel-related schedule state group, the agent is counted for the activity, only if he/she is compliant with the adherence rules for that channel. Also, if an agent is nonadherent overall, but adherent for a channel, the agent is added to the headcount for the activities for that channel.

Using reason codes

WFM enables you to enter reason (aux) codes when you configure agent-adherence rules. The reason codes are linked to Genesys agent states and add additional details to the state information. The Genesys state + reason code combination is mapped to WFM Scheduled State Groups and is displayed in Adherence views.

Tip

When you filter on user-defined reason codes in the **Adherence Filter** dialog, the reason code that you specify must not contain any spaces within or at the end of the key value.

For example, an agent might signal that she is in a **NotReady** state. By adding a reason code, she can specify that she is doing after-call work or answering email. This detailed information then appears in the Adherence Details view and agent-adherence reports.

To use reason codes, your switch must support them. See your T-Server documentation to find out whether your switch can include reason codes when it sends Genesys **TEvents**.

See also, Agent adherence reporting metrics and end notes

Reporting

WFM Web for Supervisors provides access to a variety of reports that are designed to present key contact-center data in a flexible and accessible format. The report types are:

- Configuration Reports—Contain information about work activity configuration.
- Policies Reports—Contain information about agents, contracts, shifts, and rotating patterns.
- Calendar Reports—Contain information about time off and agent calendar items.
- Forecast Reports—Display forecast interaction volumes, AHT, and staffing requirements in tabular and graph formats.
- Schedule Reports—Display schedule data for agents, activities, teams, sites, multi-site activities, and business units at various granularities. Also present budget information and schedule validation warnings and errors.
- Performance Reports—Contain various types of contact-center performance statistics in detailed and summary formats.
- Adherence Reports—Contain agent-adherence information for agents, teams, sites, business units, and the enterprise.
- Audit Reports—Contain information that enables you to audit a history of changes made within the Calendar subsystem and a history of changes made to the Master Schedule.

For more information about Workforce Management report data and other metrics, see WFM Metrics.